



## ALLENS PLUMBING<sup>INC.</sup>

THE DRAIN SURGEON

### Allens Plumbing Uses the Ascente Quote System from Compusource to Increase Sales and Efficiency, and Improve Customer Service

#### Executive Summary

When an established plumbing service contractor needed greater visibility into sales activity, the Ascente Quote System delivered dramatic results.

#### Customer Profile

- Residential and commercial plumbing service contractor known as “The Drain Surgeon”
- Headquartered on Maui, with additional operations on Oahu
- Handles 400-600 service calls each month
- Compusource customer for over 20 years

Allens Plumbing is a residential and commercial plumbing service contractor in Hawaii. Founded on Maui in 1982 by Steve Allen, the original one-man operation has enjoyed steady growth over the years. A second-generation plumber, Steve began working at his family’s company in Sylmar, California, before moving to Maui and starting his own firm. “It’s been great to watch this small company grow,” he says. “But even though we’re bigger now, the customer is still our top priority.”

Today, Allens Plumbing has expanded their operations to include Oahu, and employs more than 30 people who handle 400-600 service calls each month. Known as “The Drain Surgeon,” the company utilizes the latest technology, such as solar and trenchless technology, and the most skilled technicians to efficiently solve their customers’ plumbing challenges. One of the most respected plumbing contractors on the

#### System Benefits

- Fully integrated accounting, field service and quote management system
- Streamlines and automates the entire quote-to-work order process
- Converts a quote to a service call or job with a single keystroke
- Provides the visibility needed to maximize company sales and improve customer service

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islands they serve, Allens Plumbing continually strives to provide the highest level of service to their community's home and business owners.

## Business Challenge

For Steve Allen, technology has long provided a strong foundation for his company's business operations. He purchased his first construction-specific software system, Contrac2 from Compusource, over 20 years ago when Allens Plumbing was a three-truck operation. "You can't run a service business without a service truck," he says, "so I don't know how you can run a company without software. It's just as important as the vehicle on the road."

In 2004, Steve migrated his company to Ascente field service software, the latest Compusource solution developed specifically for HVAC, plumbing and electrical service contractors. At that time, he also adopted Traverse accounting software through Compusource, which is a leading accounting package from Open Systems that seamlessly integrates with the Ascente suite of applications. He has even equipped his service trucks with GPS tracking devices that integrate with his Ascente dispatching capabilities to more efficiently manage service call activity.

When Steve realized it was time to automate his quote management system, he naturally turned to Compusource for help. "For years we had been using word processing documents and spreadsheets to create quotes," he says. "We had hundreds of quotes in various formats stored on individual computer hard drives with no centralized access. We needed to make our quotes more accessible to the entire company."

## Compusource Solution

When Steve asked Compusource if they had a way to address his quoting issues, the software developer told him about the new Ascente Quote System, which allows service contractors to enter quote requests and produce detailed proposals that can easily be converted to service work orders or jobs. After learning about the Quote System's diverse capabilities, Steve knew he had to add the module to his Ascente solution. "I don't think any function within Ascente has had a more dramatic impact on our business than the Quote System," he states. "Without a doubt, it has increased our sales."

The Quote System is an easy-to-use estimating tool that streamlines and automates the entire quote-to-work order process. When a call-taker enters a quote request, basic information is captured in Ascente, which ensures that prospective work doesn't fall through the cracks. Next, the salesperson uses the collected information to create a bid for the service. A formalized quote is then printed for the customer or prospect and, when approved, can be converted to a service call with a single keystroke. "There is no way that our sales process could be this fluid without the Quote System," Steve says.

The Quote System can also be used to track and manage

customer feedback and generate detailed reports to track and improve sales productivity.

## Benefits for Allens Plumbing

Within six months of implementing the Quote System, Allens Plumbing had entered over 400 quotes into Ascente. Standardized formatting has delivered consistency to the company's proposals and the software's search features make it easy to find an estimate – no matter who created it.

From the call-taker and salesperson to Steve himself, the Quote System provides the visibility needed to maximize the company's sales and deliver better service to their customers. When a customer calls, for example, the call-taker can instantly see if there is an open quote for that customer and review related notes. This allows the call-taker to make an informed response to the customer's inquiry. On the sales side, having detailed visibility into quote activity helps the salesperson work more efficiently, focus on the best opportunities for new business and follow-up on recent work to strengthen the established customer relationship.

"The Quote System is also an incredible tool for managing my sales staff because they can't hide things from me," Steve explains. "This adds a level of accountability that we never had before." He uses the system's reporting functions to measure the effectiveness of sales activity based on booked service work. And, since Steve's sales team has the tools to monitor their own quotes, he doesn't feel the need to be the sales "police," which gives him more time to actually run the company.

Since implementing the Ascente Quote System, Steve has talked with other Compusource clients about the module's value to his organization. "If you create quotes," he tells them, "buy it. With all that the Quote System can do, why would you even consider holding off?"

## Looking Forward

After reaping the rewards of the Quote System, Steve is looking forward to implementing Compusource's newest innovation: Ascente MobilePro. "Without question," he states, "this technology is the future of service management."

With MobilePro, the Allens Plumbing field technicians will have a wireless solution for viewing service calls and price book information, completing work orders, processing credit card payments on-the-spot and capturing customer approval signatures. MobilePro will be especially useful for technicians working on the satellite islands because completed and approved work orders can be transmitted to the main office electronically in near real-time.

"I've looked at other systems over the years and none of them compare to Ascente and Traverse. The more we ask of our system, the more we get out of it," Steve says. "Compusource has great products."

