



IN THE SPOTLIGHT



Jake Marshall Service Uses Ascente Mobile Pro from Compusource to Increase Efficiency, Improve Customer Service and Gain a Competitive Advantage

Executive Summary

To stay ahead of the competition, Jake Marshall Service, Inc. wanted a mobile service solution that would connect their field technicians to the home office. Compusource answered the call by providing Ascente Mobile Pro.

Customer Profile

Founded in 1984, Jake Marshall Service is a full service mechanical contractor with 91 employees, 58 service trucks and over \$13M in annual revenue. The company, which is headquartered in Chattanooga, TN, and has additional offices in Nashville, TN, Birmingham, AL and Dalton, GA, performs service work, preventative maintenance and new construction. The company averages over 250 fixed price jobs and 1,300 service calls per month. Locally owned and operated, Jake Marshall Service stands out from big-name competitors like Carrier, Trane and Johnson Controls by delivering superior service from factory-trained technicians.

Business Challenge

Jake Marshall Service has been a Compusource customer since 1990 and is currently using the software firm's Ascente field service software, along with Traverse, a leading

accounting package from Open Systems that seamlessly integrates with Ascente. The company uses their Compusource solution to manage everything from accounting and purchasing to job costing and service management.

For fixed price jobs, the Ascente Job Cost module is a powerful tool for monitoring profitability. "We job cost any fixed price job that is \$1,500 or more, which lets us stay on top of gross profit," explains Danny Daniel, President of Jake Marshall Service. "We also track jobs by location and create separate P&L statements for each office. This helps us ensure that our busiest, most profitable locations are adequately staffed and that our service technicians don't experience work slowdowns."

Although Ascente and Traverse provide a robust system for managing Jake Marshall Service's operations, the mechanical contracting firm wanted a way to connect the company's technicians to the home office. "I have wanted laptops in our trucks since we

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System Benefits

- Fully integrated accounting, job costing and mobile service management solution
- Putting information at the technicians' fingertips improves customer service
- Paperless service management increases efficiency
- One-day service billing improves cash flow
- Happier customers and a more efficient field team deliver a competitive advantage

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bought our first Compusource software in 1990," Daniel states. That's why, when Compusource approached him about being a beta site for their new mobile service product, Ascente Mobile Pro, Daniel jumped in with both feet.

Compusource Solution

With Mobile Pro, service calls are dispatched electronically to technicians in the field. Using a tablet PC or other Windows-based mobile device, technicians can view service orders, enter work details, issue purchase orders, capture approval signatures for completed work, process credit card payments and electronically transfer all associated paperwork back to the home office – without touching a single piece of paper. In addition to having instant access to information like maintenance tasks and site history, technicians have Internet access to resources such as wiring diagrams to more easily diagnose problems.

After making the decision to implement Mobile Pro, Jake Marshall Service had to select a hardware platform. "We needed something that would survive the elements – severe cold in winter and severe heat in summer – and bouncing around in a service truck," explains Systems Administrator, Chad Holt. "After assessing several laptops, we decided to go with a Lenovo ThinkPad, which has a stylus for getting the customer's approval signature on the device." Internal wireless cards provide Internet connectivity, and compact, all-in-one printers allow technicians to print signed work orders for customers and scan documents in the field.

Once hardware was selected, it took Jake Marshall Service less than two months to get Mobile Pro operational. A phased deployment allowed Compusource to gather feedback for improving functionality. "We started with our Dalton office because we only had 10 technicians there," recalls Penny Gamble, the company's Controller. "As we discovered ways to improve the solution to better fit the way we do business, Compusource made changes to the product. Four months later, all 58 of our service trucks were operating with Mobile Pro."

Change hasn't been easy for some of Jake Marshall Service's technicians, but mandated use by the company's leadership drove adoption of the new technology. "I made it a dictatorship," Daniel states, "and said, 'This is the way we're going and you need to get on board.'" Over time, weekly, small-group training classes increased the technicians' comfort with Mobile Pro.

Benefits for Jake Marshall

The most remarkable benefits of Mobile Pro are increased efficiency and improved customer service, which, according to Daniel, deliver a competitive advantage. In the field, the technicians are better prepared to serve the customer. Before Mobile Pro, if a technician had a question about a service site, he would have to call the office. "Now,"

says Daniel, "he has everything he needs to take care of the customer at his fingertips."

Jake Marshall Service generates over \$5M a year in maintenance contracts and every task is itemized. Instead of printing maintenance task lists, technicians now use their mobile devices to view required tasks, enter completed work details, capture the customer's signature and e-mail the customer a copy of what's been done. A more efficient field force leads to additional benefits, like improved customer service. "We anticipate being able to handle more service calls," Daniel says, "and becoming a storage bank of knowledge for our customers and their equipment."

Although Jake Marshall Service expected Mobile Pro to make their field force more efficient, using the software for remote time entry on fixed price jobs has delivered unexpected results. "We set up the job in Ascente and dispatch it to the construction team," Gamble explains. "Each day, they enter labor hours and materials on their ThinkPads, and Mobile Pro sends the information to our job cost system." This process eliminates paper time cards and associated data entry, which increases efficiency on the accounting side.

While it's too soon to quantify a return on their Mobile Pro investment, Gamble is confident that it won't take long for the technology to pay off. "We haven't gotten our initial investment back yet," she says, "but we will before a year is over." Daniel agrees. "There's no question that increasing efficiency, improving customer service and keeping ahead of the competition returns significant value," he says.

Looking Forward

Jake Marshall Service expects to have a completely paperless service management process in six to eight months. When that goal is achieved, service billings will have a one-day turn-around. "This will help us immensely with our cash flow," Daniel states. Until then, he looks forward to discovering everything that Mobile Pro can do. "Compusource has a good product and I'm thankful that we've had the opportunity to contribute to its development."

Customer Profile

- Locally owned and operated full-service mechanical contractor
- Headquartered in Chattanooga, TN, with three additional locations
- Annual Revenues of over \$13M
- 91 employees and 58 service trucks equipped with Ascente Mobile Pro
- Averages over 250 fixed price jobs and 1,300 service calls each month