Case Study: Lifting Technology Ltd

OscarOnline

> *"The biggest benefit is we can look at anything anywhere at any time – even when I am away on holiday in Portugal. It makes information search and retrieval so fast with the benefit of everything in the one system"* **George Scholes MD Lifting Technology Ltd**

Head office: Upper Brailes in the Cotswolds

Background

Privately owned, Lifting Technology has rapidly established itself as the leading UK name in Scissor Lifts and providing bespoke lifting solutions.

Founded 15 years ago, the current staff level of 14 is expected to expand as the company grows turnover from £2.2M to £3M by 2017.

Lifting Technology Scissor Lift

Challenge

With 90% of our installations being bespoke we spend significant time producing customised quotes, ordering parts, installing systems and servicing implementations as well as managing our finances. We had tried in the past to build our own IT solution before investing in a commercial ERP system but we did not find either approach satisfactory.

In 2010 we moved into two offices with three homeworkers covering different regions in England and the need for everybody to share the same information regardless of location was a key requirement.

What we wanted was a simple to use single comprehensive system that was specifically designed to meet the SME needs. This would allow us to do more with the same staff rather than recruiting and adding costs.

Lifting Technology Loading Bay Lift

Solution

We started with OscarOnline® (Oscar) in 2010 initially to produce our custom quotes including maintenance quotes, ordering parts, raising invoices and for basic bookkeeping.

This was followed later by holding all our contacts in the system, enabling us to professionally market to them to increase our repeat business.

Stage 3 was integrating the bookkeeping into accounts which means our accountant uses Oscar to access our accounts information to produce our annual accounts with hardly any need to ask questions. Bank payments are posted into Oscar daily.

In early 2011 we added the stock control and service & support contract capability.

We now have 10 concurrent licences. Our service engineers use tablets when they are on the road or customer site where they can check spare part availability.

While at a prospect sales can discuss requirements, generate a bespoke professional quotation that includes checking stock levels for parts required and hopefully close the deal.

Oscar today holds nearly 3,000 products, over 7,500 contacts and produces an average of over 110 bespoke quotes per month.
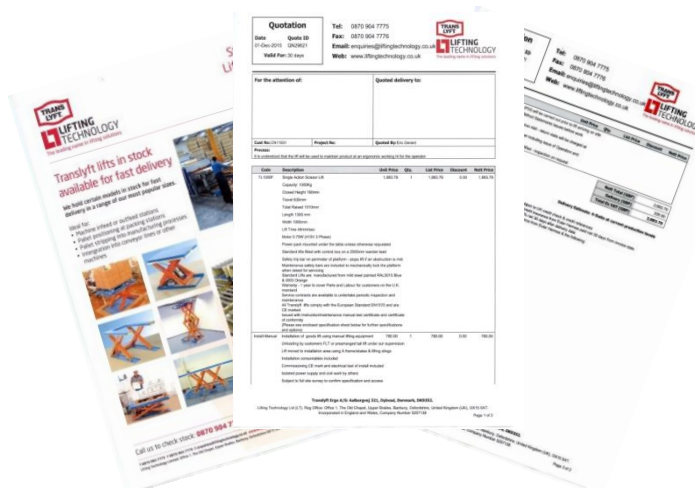
Lifting Technology bespoke quote
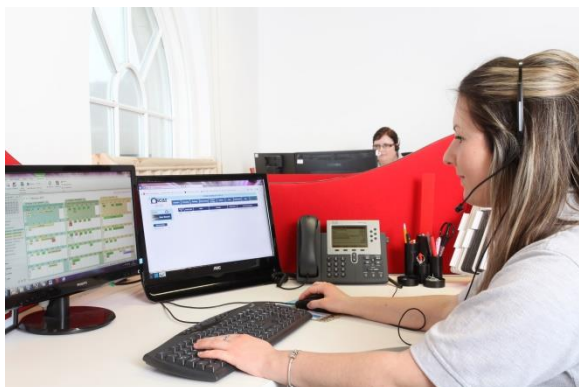
Lifting Technology Service Desk

Benefits

Oscar has meant our staff are far more productive and allows us to interact with our prospects and customers in a timely and professional manner. When talking or visiting a contact any member of staff can see our latest customer engagement whether to do with placing an order, paying an invoice, raising a service call or arranging a maintenance visit.

The management reports are a big benefit. We have our product portfolio broken down into profit centres and can report on these showing the gross margin for each one. We can also see the ROI for any particular customer.

We can plan service visits much more efficiently as we can use Oscar to look at service contracts by post code regions and sort by visit due dates. This allows a service engineer to plan a number of visits all within a local area.

Oscar generates standard letters such as when a customer's product comes out of warranty cover or when their service contract is about to lapse / has lapsed.

Accessing Oscar over the internet has meant we have no Oscar hardware or system to maintain and upgrade other than our PC's, tablets and smartphones. All our data is held in a secure location with all our communication over the internet being automatically encrypted for added security. The system has been very reliable with only one outage in 5 years when the main computer server had to be rebuilt on new hardware. Thanks to the automatic data back-ups every 15 minutes minimal data was lost.

If we did not have Oscar – we would need more staff, Accounts would be a nightmare, Quotes would be a manual time consuming process and management would not have the same visibility of the business.