

# REGIONAL MANUFACTURER-DISTRIBUTOR STOCKS UP ON SMARTSEARCH

CASE STUDY



**BUSINESS:**  
HVAC Products  
Manufacturer, Distributor &  
Manufacturer's Rep

**COMPANY:**  
Buckley Associates, Inc.

**OBJECTIVES:**  
Eliminate paper and  
standardize critical business  
processes across the  
organization

## To help standardize and streamline its critical business processes, a leading HVAC business cooled to paper and warmed up to SmartSearch

Information access is vital to every business enterprise. But how do you ensure fast, reliable access to critical business information that is spread out over multiple states? Buckley Associates found the answer in SmartSearch.

"After 40 years of growth, we had six locations—and six different ways of doing everything," said Robert Buckley III, director of information technology for Buckley Associates, Inc. "To continue growing and remain competitive, we needed to reduce our use of paper and the workload that paper created, and we needed to standardize our internal business processes so we were all doing the same things in the same way. SmartSearch helped us do this. The solution adapted easily to our Windows-based enterprise resource planning (ERP) system and was far less expensive than another, less effective solution we had tried. With SmartSearch, we are now operating from 20 to 30 percent more efficiently than we were."

Headquartered in Hanover, Massachusetts, Buckley Associates is a manufacturer, distributor and manufacturer's representative of heating, ventilation and air conditioning (HVAC) products serving the northeastern United States. Founded in 1970, the family-owned company maintains five well-stocked warehouses throughout Connecticut, Massachusetts, New Hampshire and New York. The company manufactures its own line of sheet metal products at its plant in Hanover and is the exclusive distributor for market leaders Greenheck and Price Industries. "We represent the most complete array of products in the industry," Buckley said. "Customer service is Buckley Associates' highest priority and we offer a combination of manufacturing, distribution and engineering capabilities to meet our customers' specific needs. Our service is unquestionable in all phases of our business."

Core business processes at Buckley Associates revolve around sales orders for customers and acknowledgements and invoices from suppliers. The company processes from 200 to 300 sales orders daily, most taken by phone or e-mail. "The biggest problem with our original paper-based system had been that sales orders and other documents in one location could not be viewed by employees at other locations," Buckley explained. To address this, the company purchased document management software, but it was extremely expensive and adequate licensing was cost prohibitive. As a result of this—and "really lousy" support from the developer—the software was used only as a document repository, an "afterthought" that did nothing to streamline operations.



## ABOUT

### SQUARE 9 SOFTWARES

Square 9 Softworks is a leading developer of innovative, business-centric software solutions including the award-winning SmartSearch Content Management Suite. Dedicated to making content management available to organizations of all sizes, Square 9 Softworks designs solutions built on open architecture and cutting-edge technologies that drive efficiency and productivity across all business applications.

Through decades of experience with content management technologies in business enterprises of all kinds, Square 9 Softworks has acquired a thorough understanding of document-driven business processes. Intensely customer-focused and highly responsive, the company delivers effective, value-driven solutions and has achieved a reputation for excellence in meeting the rapidly evolving needs of its customers.

Square 9 Softworks distributes its solutions exclusively through a network of highly skilled channel partners from its corporate office in New Haven, Connecticut. For further information, visit [www.square-9.com](http://www.square-9.com)

While developing plans to standardize its business processes, Buckley Associates began a careful search for an affordable, easy-to-use electronic content management solution that would be compatible with its existing ERP system. "We made a list of the things we wanted," Buckley recalls, "and when we were given a SmartSearch demonstration, we saw that it did everything we needed at a price we just could not pass up. We are using SmartSearch as a workflow engine, digitizing processes that had been paper-based and making information visible to people across the organization. Before SmartSearch, that information had been locked in paper documents or electronic silos and could not be shared easily."

Now, most of the thousands of documents Buckley Associates receives weekly by e-mail and fax—including sales orders, acknowledgements and invoices—are simply "dragged and dropped" into SmartSearch and carefully indexed, streamlining operations in many key areas. Before SmartSearch, for example, the billing department would have to print copies of invoices and acknowledgments and then try to locate the original paperwork and match them up. "This was extremely time consuming, sometimes resulted in errors and compromised customer service," Buckley said. "With SmartSearch, all our offices follow the same procedures and headquarters has immediate access to these documents. This is especially important at the end of the month when we are trying to bill customers. Before SmartSearch, we had billing 'log jams' because we could not quickly access some of the documents we needed."

Buckley Associates measures the return on its investment in SmartSearch in two primary ways: 1) the ease and speed with which documents can be filed and retrieved, and 2) the accessibility of those documents across the enterprise. "Our ability to find documents quickly with SmartSearch has had a positive impact on our bottom line," Buckley said. "With a file cabinet system, you can only file documents one way and when they are removed you run the risk of losing them. With SmartSearch, you can index documents in many different ways for quick, easy retrieval and you don't have to rely on others to find them. This saves a lot of time and money."

Reduced paper storage is another success measure. "Since implementing SmartSearch, many of our file cabinets have been eliminated," Buckley said. "In our Hanover office, for example, we used to have a hallway filled with about two dozen file cabinets. Now there are only three, and by the end of our first year of using SmartSearch those should be gone, too."

Would Buckley recommend SmartSearch? "Definitely!" he exclaimed. "Today, businesses of all sizes simply must have an electronic content management solution to grow and move forward. Paper-based systems are just too inefficient to be competitive. There are many solutions available today and it can be hard to find the right one for your company, so finding a great solution like SmartSearch and an outstanding company like Square 9 Softworks that stands behind it makes all the difference."