

Regional Manufacturer-Distributor Stocks Up on GlobalSearch®

"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. GlobalSearch 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 GlobalSearch, we are now operating from 20 to 30 percent more efficiently than we were.**"



20-30%
More
Efficient

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 email. "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,

Snapshot

Industry:

HVAC Products Manufacturer and Distributor

Departments Impacted:

Sales, Customer Service and Billing

Featured Products:

GlobalSearch and GlobalAction

Objectives:

Eliminate paper and standardize critical business processes across the organization

an "afterthought" that did nothing to streamline operations.

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 GlobalSearch demonstration, we saw that it did everything we needed at a price we just could not pass up. We are using GlobalSearch as a workflow engine, digitizing processes that had been paper-based and making information visible to people across the organization. Before GlobalSearch, 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 email and fax—including sales orders, acknowledgements and invoices—are simply "dragged and dropped" into GlobalSearch and carefully indexed, streamlining operations in many key areas.

Before GlobalSearch, 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 GlobalSearch, all our offices follow the same procedures and headquarters has immediate access to these documents. This is especially

Increased
Document
Accessibility



important at the end of the month when we are trying to bill customers. Before GlobalSearch, 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 GlobalSearch 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 GlobalSearch 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 GlobalSearch, 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 GlobalSearch, 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 GlobalSearch those should be gone, too."

Would Buckley recommend GlobalSearch? "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 GlobalSearch and an outstanding company like Square 9 Softworks that stands behind it makes all the difference."