

COMMERS WATER KEEPS INFORMATION FLOWING THROUGHOUT THEIR 3 LOCATIONS

Case Study:
Commers Water
with **Julie Ackerman**, CFO and Operations Manager

Industry:
Water Treatment and Conditioning Retailer

Departments Impacted:
Accounting, Retail, and Service

Featured Products:
GlobalForms®, GlobalSearch®, and GlobalAction®

Objectives:
Implement a solution where all employees have access to their documents at one time



Meet Commers Water

Commers Water is a Minnesota-based water treatment and conditioning retailer specializing in the sale, rental, and maintenance of various water treatment systems. Founded in 1947 on the promise of delivering a better water softener for Minnesota's notoriously hard water, Commers Water is a 3rd generation, family-owned business with 3 locations. Their Blaine office houses their accounting and service departments, and their other two sites are for retail.

Challenge

Julie Ackerman, CFO and Operations Manager for Commers Water, wanted a solution where all employees would have access to their documents at one time.

Commers Water also wanted to implement digital forms for the sales team to enter new orders. While there was a unified paper form in use, the sales team's handwriting of orders would be difficult to read and would include manually tallied up prices and sometimes were not filled out completely. Lastly, they needed a solution to improve communication throughout their departments. Once the paper order forms were complete, there was no confirmation of delivery to the correct person or if the order was added to the fulfillment schedule.

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There have been many times where we would have 4-5 people in our Blaine office looking for a specific piece of paper, leading to a time-consuming search”

Julie Ackerman

Solution: GlobalForms, GlobalSearch, and GlobalAction

Through Commers Water IT Partner, Coordinated Business Systems, they found Square 9 Softworks Enterprise Content Management System, GlobalSearch.

Implementing GlobalForms, GlobalSearch, and GlobalAction went smooth for the most part, but

getting the staff used to a new way of submitting orders was challenging. After additional training sessions in large groups and individuals, the teams understood how to use the solution and saw how it improved their processes.

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“We initially looked at GlobalSearch in 2017, and I continued to revisit it with upper management; once they saw the benefits of moving away from paper forms and making them digital, they knew it would be a good fit”

Julie Ackerman

Benefit

"The departments using GlobalForms, GlobalSearch, and GlobalAction, use it frequently, especially in the order entry department. They can't believe how they used to work before they didn't have this solution in place," said Ackerman.

Using GlobalForms for their order entry submission process holds everyone accountable. GlobalAction has improved technology and communication throughout the three locations by routing completed sales orders to the right department. With GlobalForms, specific fields require completion before submitting the form, and then it is routed to the correct department every time. Upper management likes being able to see where documents are throughout the different stages of the workflow they set up.

Result

Since implementing GlobalForms, GlobalSearch, and GlobalAction, the sales department has reduced its sales cycle, and the digital forms have created more accountability for the sales team.

The information collected from the sales order forms is stored in GlobalSearch, and everyone can easily search and find the documents they are looking for. They have also implemented another digital form for repair orders, which has led to additional sales.

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The best part about this solution is the consistent flow of information going to the right place, at the right time properly. I was also happy to see that 50% of our sales staff do not use paper at all anymore by keeping their sales notes on the digital lead form and then making additional notes after the form is stored in the archive.

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Julie Ackerman

CFO and Operations Manager



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