



## Lefever Plumbing & Heating, Inc.

[www.lefeverph.com](http://www.lefeverph.com)



### At A Glance:

- **Company:** Lefever Plumbing & Heating, Inc.
- **Location:** Elkhart, IN
- **Industry:** Services: Professional Services; Wholesale/Distribution
- **Challenges:**
  - Move from a low-tech, paper-based back office to a more efficient, integrated system that can speed up the invoicing process
- **Software switched from:** Contractor Management Services (CMS), QuickBooks
- **Other software considered:** Ascente from Compusource, Wintac
- **NetSuite Partner:** Solution Source
- **Results with NetSuite:**
  - 20 percent reduction in the time it takes to generate invoices
  - Better understanding of how profitable different types of work are — and what sort of jobs to focus (and de-focus) on



*“With NetSuite, our billing process is streamlined and our cash flow has substantially accelerated.”*

— *Luke Lefever, General Manager*

*Lefever Plumbing & Heating, Inc.*

### The Results:

Since moving from a paper-based back office to one powered by NetSuite, Lefever Plumbing & Heating has been able to decrease the time between performing a repair and sending an invoice by 20 percent. That has translated into faster payments from customers. “With NetSuite, our billing process is streamlined and our cash flow has substantially accelerated,” says Luke Lefever, general manager of the family-owned company.

By providing access to metrics and reports that can give an instant — or a long-term — picture of business, NetSuite has also enabled Lefever to discover the types of work that bring it the most — and the least — profit. That has allowed the company to tweak its focus to maximize results. Less-profitable work, like water pump repairs, is now referred to other contractors, while Lefever focuses on more profitable work, like boiler repairs.

“NetSuite’s reports let us better understand what we do well, and where our best business lies,” says Lefever. “By honing in on our most profitable work, we’re growing our business. This year we’re on track to experience more growth and profit than ever before, and NetSuite has played a big part in that.”

### The Challenges:

After 28 years, a business gets used to doing things a certain way — but still may not like it. That was the case at Lefever Plumbing & Heating, where the paperwork was still done on paper and the staff didn’t know how to use a computer mouse, let alone sophisticated software. Founded in 1978 by Luke Lefever’s father, Bart, the company had grown, over the years, into a busy, successful enterprise, repairing plumbing and heating systems and landing re-modeling and retrofit work for both residential and commercial properties. But its back-office system was woefully antiquated. Generating an invoice took too much time and effort. The result: Revenue flowed in, but not as fast as it could.

“It was a completely manual process,” says Luke Lefever. “Every time we used material on a job we’d have to look through catalogs to calculate what we should charge. We’d do that for every single item we used. It’s embarrassing to think we were doing it this way in 2005.”

Lefever didn’t so much choose to upgrade as had the decision made for it. The DOS-based dispatching system it had been using for 15 years, Contractor Management Services (CMS), had been designed in the late 80’s — and looked it. “It was pretty badly dated and never made the transition to Microsoft Windows,” says Lefever. “It could generate a work order, but it didn’t know anything about material prices so we’d have to invoice manually, using paper catalogs.

🔗 **Find out more: contact NetSuite, Inc. at 1 877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com)**



***“NetSuite gives me a better sense of what's going on in my business and where I should focus. I can see which kinds of jobs are most — and least — profitable.”***

*— Luke Lefever, General Manager*

*Lefever Plumbing & Heating, Inc.*

Then CMS went out of business and there was no one to support the package. We knew it was time to go."

For a while, Lefever couldn't find an alternative that seemed to fit its business. One package it looked at — Ascente, from Compusource Corporation — required Lefever to buy dedicated hardware, at a cost in excess of \$50,000. Another solution — Wintac Pro — was inexpensive, but perhaps too much so. "It didn't offer the flexibility we needed for the long term," says Lefever. "It was more like a disposable product." That, he says, wasn't going to work: "If we were going to make a big jump to another system we wanted something we could stick with."

Another problem was how Lefever was going to steer its workforce into the computer age. "The hardest thing for us was that a lot of our founders and employees are old school," says Luke Lefever. "They didn't even know how to use a mouse." To help guide the transition, Lefever partnered with a technology consulting business, Indiana-based Solution Source. A NetSuite Solution Provider, they, in turn, introduced Lefever to NetSuite. The company liked what it saw. "We wouldn't need any dedicated hardware, and NetSuite was Web-based, so we could access it from anywhere," says Lefever. "We wouldn't have to worry about updates or maintenance, and we liked the subscription-based model, because it didn't lock us into a solution."

The deciding criteria, however, was that NetSuite gave Lefever room to grow. "With NetSuite, we have the potential to go mobile, giving our technicians devices that enable them to open work orders right in the field, and send information in real-time back to our dispatchers," says Lefever. "Paperwork slowed us down, but with NetSuite we could speed up our cash flow, getting our invoices out — and paid — faster."

### **The Solution:**

By partnering with Solution Source, Lefever was able to smooth the transition from paper and pencils to Windows and Web browsers. "They helped us by streamlining processes, showing us where we could cut out steps to improve our workflow," says Lefever. "They also helped us customize NetSuite, creating special work-order screens and dashboards that used the terminology we use in our industry." The result: a transition far easier, and quicker, than Lefever could ever have hoped to achieve on its own. "There are probably a lot of mom-and-pop businesses out there that are doing things the same old-fashioned, manual way we were," says Lefever. "Working with a partner like Solution Source gives them access to the technical expertise and insight they don't have themselves."

Together, Lefever and Solution Source were able to transfer customer information — from the QuickBooks package Lefever had been using for accounting - into NetSuite. Material prices were then imported from the paper catalogs the company had been using to complete its invoices. Now when a customer calls with a job, the workflow is far more efficient. "Instead of looking up the price of materials and figuring out what to charge, we can simply enter the material and NetSuite brings up the correct charge and automatically adds it to the customer's invoice," says Lefever. "That lets us get our invoices out much quicker, which has significantly sped up our cash flow."

NetSuite's ability to collect data and create a wide range of reports has also helped Lefever improve its bottom line. "NetSuite gives me a better sense of what's going on and where I should focus," says Lefever. "I can see what kinds of jobs are our most — and least — profitable." For example, since launching NetSuite in March 2005, Lefever has discovered — through reports the system generates — that water pumps were not very profitable work, but boiler work was extremely profitable. "As a result, we've decided not to work on water pumps but to actively seek out more boiler repairs," says Lefever. "Now that we're on NetSuite, the only thing that holds us back is us."

 **Find out more: contact NetSuite, Inc. at 1 877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com)**