



Tim Wilson-IT Director

CASE STUDY

Lon Smith Roofing: Successful ERP Overhaul for Streamlined Business Operations

ABOUT THE COMPANY

Established in 1974, Lon Smith Roofing has built a strong reputation as one of Texas's leading residential roofing contractors. With over 100,000 roofs installed across 14 cities and seven states, the company has cemented its position as a trusted provider of roofing services.

Despite its impressive track record, Lon Smith Roofing faced significant challenges due to its reliance on outdated software systems. These antiquated systems created inefficiencies, data silos, and hindered the company's ability to scale and adapt to changing market demands..

THE OUTCOME

I successfully addressed Lon Smith Roofing's critical IT challenges, delivering a comprehensive solution that yielded measurable results. The company experienced significant improvements, including:

- **40%** reduction in manual data entry errors.
- **25%** improvement in production efficiency due to better inventory tracking.
- Real-time financial reporting that reduced the month-end close process by **50%**.
- Improved scalability, allowing the company to handle a **20%** growth in orders.

These improvements directly contributed to Lon Smith Roofing's enhanced efficiency, scalability, and overall business performance.

AT A GLANCE

Technical and Operational Challenges

- **Outdated Technology:** Hardware and software needed to meet current industry standards, leading to performance issues and security vulnerabilities.
- **System Fragmentation:** Multiple, disconnected systems that hinder data flow, create inefficiencies, and make it difficult to obtain a unified view of operations.
- **Scalability Issues:** There was a lack of flexibility to accommodate growth or changes in business needs, resulting in limitations on expansion and productivity.
- **Manual Processes:** Reliance on manual tasks that are time-consuming, error-prone, and hinder efficiency.
- **Integration Problems:** Difficulties in integrating financial, inventory, and production systems, leading to inconsistencies and data inaccuracies.
- **User Onboarding Difficulties:** Complex procedures and multiple systems made it challenging for new users to become productive quickly.

solution



THE SOLUTION

Hardware and Infrastructure Upgrade:

- Replaced outdated hardware with modern servers and workstations.
- Migrated to a hybrid cloud infrastructure, combining on-premises resources with cloud-based services for scalability and flexibility.
- Implemented virtualization to optimize resource utilization and reduce hardware costs.

ERP System Implementation:

- Selected and implemented a comprehensive ERP system that integrated finance, inventory, and production management.
- Customized the ERP to meet Lon Smith Roofing's business processes and requirements.
- Provided extensive training to ensure smooth adoption and utilization of the new system.

Process Automation:

- Automated key business processes, including order processing, invoicing, and inventory management, using the ERP system and custom-built workflows.
- Developed automated reporting tools to provide real-time insights into operations and financial performance.

Data Integration and Synchronization:

- Established seamless data integration between the ERP and existing systems, ensuring consistent and accurate information across the organization.
- Implemented data synchronization mechanisms to maintain data integrity and avoid discrepancies.

User Onboarding and Training:

- Developed comprehensive training materials and conducted training sessions to familiarize employees with the new systems and processes.
- Provided ongoing support and assistance to users during the transition period.
- Established a help desk to address user queries and issues promptly.

IT Infrastructure Optimization:

- Implemented network security measures to protect sensitive data and prevent unauthorized access.
- Regularly monitored and maintained the IT infrastructure to ensure optimal performance and reliability.

PROVIDED ONGOING IT SUPPORT AND MAINTENANCE SERVICES TO ADDRESS ANY TECHNICAL ISSUES.

THE PROCESS

Discovery (Finding an ERP that Meets the Needs)

Timeline: 2–4 weeks

- **Process:** The discovery phase focuses on researching and evaluating different ERP solutions to ensure they align with the company's needs. Key stakeholders meet to outline business requirements, create a list of potential vendors, and assess each ERP system's features, scalability, and cost. **Hurdles:** Choosing
- between on-premise and cloud-based ERP systems; aligning the ERP functionality with future growth plans. **Resolution:** Conduct detailed demos with vendors,
- including use cases specific to the business, and engage key decision-makers in finalizing the selection.

Process Management (Business Flow from Lead to Collection, Developing SOPs)

Timeline: 4–6 weeks

- **Process:** Map out all business processes from lead generation to cash collection. Standard Operating Procedures (SOPs) are developed to formalize these processes, ensuring consistency and efficiency. Departments work together to identify gaps in the current processes that must be addressed in the new ERP system.
- **Hurdles:** Ensuring cross-departmental alignment and agreement on standardized processes.
- **Resolution:** Hold workshops and brainstorming sessions with department heads to agree on workflows and document them in detail.

Meeting with Department Heads to Develop Test Scripts and Order of Operations

Timeline: 2–3 weeks

- **Process:** Collaborate with department heads to develop test scripts that simulate day-to-day operations. These scripts ensure that the ERP system performs effectively across all business areas, including sales, finance, inventory, and production.
- **Hurdles:** Resistance to change and concerns about system disruptions during testing. **Resolution:**
- Emphasize the importance of early testing to identify issues before going live. Get buy-in by involving department heads in crafting realistic test scenarios.

Data Migration from the Old System into the New

Timeline: 3–5 weeks

- **Process:** Extract, clean, and transform data from the legacy system into the new ERP. This includes financial records, customer information, inventory data, and production details.
- **Hurdles:** Data inconsistencies, poor data quality in legacy systems, and compatibility issues between old and new platforms.
- **Resolution:** To ensure accuracy, perform thorough data cleaning, reconciliation, and multiple dry-run migrations.

Testing in Each Department to Solidify Processes and find Errors or Gaps

Timeline: 3–4 weeks

- **Process:** Conduct end-to-end testing within each department using the developed test scripts. Departments validate the system's functionality, identify errors, and ensure processes flow smoothly.
- **Hurdles:** Errors in data mapping, process gaps, and system configuration issues. **Resolution:** Conduct
- iterative testing and involve key stakeholders from each department to identify and resolve issues. Document changes and re-test until the system operates smoothly.

Set Launch Date

Timeline: 1 week

- **Process:** After successful testing, set a definitive go-live date. Create a comprehensive launch plan that includes user communication, system switchover, and contingency planning in case of unforeseen issues.
- **Hurdles:** Balancing the launch date with business operations to minimize disruptions.
- **Resolution:** Coordinate with all departments to ensure the launch date aligns with business cycles and minimize downtime. Prepare backup plans for critical processes.

Develop Documentation and SOPs for Managers to Utilize for Training

Timeline: 2–3 weeks

- **Process:** Create comprehensive user manuals, SOPs, and employee training materials. These documents serve as a guide for using the new ERP system and ensure all users understand how to perform their tasks efficiently within the new framework.
- **Hurdles:** Ensuring that the documentation is user-friendly and comprehensive enough for all levels of employees.
- **Resolution:** Work closely with managers to create role-specific documentation. Pilot training sessions to gather feedback and make revisions as necessary.

IF YOUR BUSINESS IS STRUGGLING
WITH OUTDATED SYSTEMS, CONTACT
TIM WILSON TO DISCUSS HOW AN
ERP OVERHAUL CAN STREAMLINE
YOUR OPERATIONS AND DRIVE
GROWTH.