

International Pipe Gains CRM, Boosts Productivity with Acumatica



OVERVIEW

International Pipe & Supply LLC, a family-owned company with decades of steel pipe distribution experience, used SouthWare ERP for the last decade. But the legacy software was extremely difficult to use, lacked a system to track sales leads, and had weak financial reporting. Rather than bolt-on applications, International Pipe implemented Acumatica, a unified, modern business platform, gaining financial visibility, sales tracking, and ease of use that increased productivity.

SITUATION

Imagine having to know a secret code system to navigate your daily software application, a code system with no rhyme or reason. Or having to manually calculate what your month-to-date sales or expenses were because your ERP only handled data on a year-to-date basis.

In an age where nearly everyone points, clicks and swipes, operating on such an antiquated system can be frustrating. For years, the team at International Pipe & Supply struggled on such a system; they used SouthWare ERP.

Scott A. McCalla, Chief Strategy Officer at International Pipe, remembers the day he joined the Oklahoma City-based company and was handed the code list he was told he'd have to memorize. He also remembers the stunned look he'd get from new hires over the years when they learned they had just stepped back into what can be described as the era of Microsoft DOS.

"SouthWare was incredibly difficult to use," McCalla says. "It wasn't point and click. You had to know secret codes like F3 this time but F12 on the next screen. The software was really, really, really difficult to train and it didn't give us the basic reporting we knew we could get with other software programs."

International Pipe sells prime and non-prime carbon steel pipe and welding, cutting, and cleaning services to the construction industry through International Pipe, Bison Pipe, based in Twin Falls, Idaho, and newly acquired BigFoot Pipe & Piling, located south of Seattle.

No Process to Track Leads

Two and a half years ago the sales team demanded better tools to track prospects and customers. Each salesperson tracked prospects and leads on their own spreadsheets and each did so differently. It was hard to track conversations, keep detailed notes and track a prospect's interactions with the company.

"We looked at Salesforce, but it was a short conversation," McCalla says. "The big question for us was 'Why go piecemeal?'" From experience with JD Edwards, Cognos, and other software, he and others knew it was expensive to take best-of-breed applications and try to make them talk to each other.

"If you're going to upgrade, make it all the same package so you have one place to go for help," he says. In addition to sales tracking capabilities in a robust CRM, the new ERP needed to have "an inventory system that would bend and flex," McCalla says. That's because International Pipe was outgrowing the complicated spreadsheet it used outside of SouthWare to track inventory.

The company sells its pipe, which can be new or used, by length, weight, and diameter, among other specifications, stored in its yards around the country. The pipe inventory is not tracked by SKUs but intelligent inventory part numbers so the company can optimize what it has in stock.

COMPANY

- **Location:** Headquarters in Oklahoma City, OK, with 14 other locations nationwide
- **Industry:** Distribution
- **Application Replaced:** Legacy Other
- **Application Evaluated:** NetSuite, Sage, and Microsoft Dynamics, Salesforce

SOLUTION

- Acumatica Distribution Edition with:
 - Advanced Financial management with Fixed Assets
 - Inventory Management
 - Order Management
- Acumatica Customer Management

KEY RESULTS

- Saved hours and greatly increased productivity with easy-to-use software
- Gained sales lead tracking and CRM
- Reduced time to close monthly books from 15 days to 3
- Achieved visibility throughout three companies and 15 pipe yards
- Built custom dashboards and reporting functionality to make better data-driven decisions
- Replaced manual Excel spreadsheets, saving time

SOLUTION

Cloud-based ERP seamlessly connects business processes

International Pipe evaluated NetSuite, Sage, and Microsoft Dynamics but chose Acumatica based on the recommendation of its IT partner, Advanced Systems Group, and because Acumatica delivered exactly what they wanted, McCalla says.

With the help of ASG, an Acumatica partner, International Pipe implemented Acumatica Distribution Edition with: Advanced Financial Management, Order Management, Inventory Control, Acumatica Customer Management, and Fixed Assets.

"Implementation was really positive," McCalla says. "We took our time and hiccups were dealt with swiftly. Within two months post go-live our issue whiteboard was just about wiped clean. That's pretty good for an implementation in three companies."

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BENEFITS

Better Data-Driven Decisions at International Pipe

With Acumatica, International Pipe employees access critical data throughout the business within seconds and make much better decisions, decisions that are driving increases in revenues and profits and can be made from anywhere in the world. McCalla, for example, is happier, much more productive, and enjoys telling new recruits how much they will love using Acumatica and its modern user interface. "It's been a significant enhancement for me, and I can attest to Acumatica's ease of use," he says. "With SouthWare, we lacked reporting functionality for the entire business – financials, sales or whether it was AR or AP. In Acumatica, there's a lot more report functionality and it takes just a click to generate a report."

Modern, Easy-to-Use Interface Replaces Codes

The owners use dashboards to see cash balances, the state of accounts receivable, and then can decide what data they want to drill down on at the click of a mouse rather than referencing secret codes to hunt around for the information and wasting a lot of time. McCalla says he has saved a significant amount of time using Acumatica's dashboards, which serve up critical information when he logs in. "Acumatica allows me to uncover pinch points quickly," he says, explaining previously he had to painstakingly log in and out of each company, gather data from various silos, and then crunch numbers manually in the hopes of discovering problems. "Now, I'm just a log in away from everything I need. The time savings is significant." Previously, it took his team some 15 days to close the books for two companies each month. With Acumatica,

he has shaved it to three to four days because he's taking his time as they get used to the platform. He says the company will soon reduce that to two days to close all three companies. "The intercompany module is super easy to use," McCalla says. "It's easy to bounce back and forth from one company to another without needing all new passwords, new usernames, and different log ins. Now I can do a report that rolls everything up rather than wasting time manually tracking things on Excel and using a calculator."

Ease of Use Drives Adoption

McCalla is so impressed with Acumatica's ease of use that he's touting it as a job perk. "It is a draw to say we have the latest and greatest ERP software on site," he says. "That's exciting to us and we're already mentioning it in interviews. Before we wouldn't mention a thing and we'd surprise them on day one by giving them the list of three letter code words and I'd just get the look: 'You've got to be kidding me.'" Acumatica's user interface has led to high adoption, McCalla says. "The users were so tired of the old system. Once they realized how intuitive Acumatica is and discovered that if they got lost, there's help available on each screen, so they weren't going to get stuck, the buy-in was there."

"Acumatica allows my focus to be more on the business rather than wondering where I go to find the information I need. Knowledge is power and the quicker you can get to the knowledge, the better off you are."

– Scott McCalla, Chief Strategy Officer

Accelerating Sales

The sales team at International Pipe is divided along industry types rather than geography. Each person kept notes on their own spreadsheets and no two were the same. SouthWare lacked tracking on the customer and sales side, McCalla says. There was no process to track or share leads as they came in through social media or via phone calls and as leads increased, sales asked for better tools. "With Acumatica, one of the big changes is that we can now track a lead to a customer with all the associated notes along the way so we can capture that information," McCalla says. "With better information and improved reporting, we're expecting to see better sales results and improved customer retention."

Cloud Access from Anywhere

Executives and owners at International Pipe who travel to their 15 yards frequently are no longer required to print out reams of paper or struggle to access critical data while on the road. Previously, logging in securely via the company's VPN was difficult. McCalla says. Acumatica has profoundly changed the way many at International Pipe operate daily as they now have a modern approach to business management thanks to the new Acumatica solution.