



## CASE STUDY: MORRIS-JENKINS



## About MORRIS-JENKINS

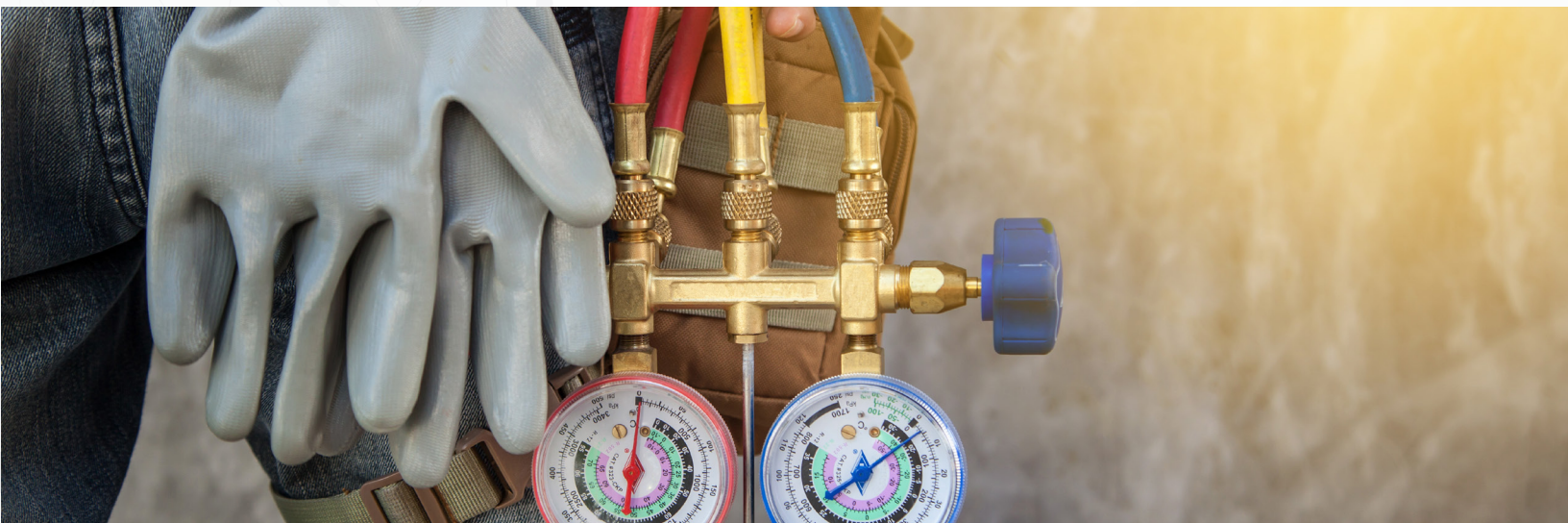
Founded in 1958, Morris-Jenkins is a company that has grown to be the largest in the region while still maintaining a small town approach to customer care. In addition to building a personable, friendly staff and providing quick service, Morris-Jenkins continues to focus on their philosophy of making it easy for customers to do business with them. At the core of the business is the Morris-Jenkins Priority Advantage (PA) program. A preventative maintenance agreement program with over 27,000 members, PA is the lifeblood of Morris-Jenkins and offers an opportunity for Morris-Jenkins to better serve their customers year-round.

**Services Provided:** Air conditioning, heating, and plumbing sales, installation, and maintenance

**Founded:** 1958

**Areas Served:** Charlotte, NC, metro area

**WorkWave Solutions:** WorkWave ServMan



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# The CHALLENGE

In 2017, Morris-Jenkins identified an area in which they weren't making it easy for their customers to work with them: the Priority Advantage program. When field employees sold new agreements, they would complete a paper form with the customer—often containing written credit card and bank account information. These forms, if they weren't first misplaced along the way, would be turned into the office roughly once a week when field employees would pass through, creating a significant delay for new PA members.

Staff in the back office were selling new agreements using sales orders, which then needed to be input into the Batch Contract Wizard, along with add-ons and renewals. These would then be manually set-up using the new PM Agreement Wizard by the PA administrators, adding a number of steps to the process.

During this time, the PA department at Morris-Jenkins was receiving 200-300 emails per day for various PA-related requests, ranging from updating payment methods, to cancelling agreements, to requesting receipts. On top of this, they were fielding calls from members and employees in an effort to keep things running smoothly. The result was an overwhelming workload, which left the staff stressed and customers frustrated. A month-long waiting period for activating new PA memberships made it clear that something needed to change in order for the program to thrive.

“ Our Field-to-Office employee ratio, a metric we use to evaluate our effectiveness at automation in ServMan, **went from 1.67:1 in May 2018 to 1.9:1 in April 2019.**

## We've grown as a company,

particularly our field employee count, while maintaining (or, in some areas, reducing) the number of office employees necessary to support the business. This wouldn't be possible without continuous process improvements and automation through ServMan. ”

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# The SOLUTION

At the end of 2017, Morris-Jenkins began a quarterly company priority called MJ Easy, which focuses on identifying areas of the business which can be simplified in order to make things easier for their customers. In large part, this ongoing process has relied on using WorkWave ServMan's features and custom programming to automate complex, time consuming processes.

Within the PA department, buttons were added to the job screen to cover common reasons the back office would email requests to PA administrators. These buttons correspond with phases on the PA job in WorkWave ServMan, changing the job phase, adding notes to account info, and pulling the job into a custom smartview with the click of a button. This smartview allows the PA team to sort, filter, and manage their workload in a way that was previously impossible using a shared email box.

In April 2018, the MJ Easy initiative sparked Morris-Jenkins to automate their PA agreements. Working with WorkWave ServMan, they were able to create a mobile form for field use to correlate with a new PM Agreement Wizard that had been modified into an MJ version. Both processes now allow the staff to set up a new maintenance agreement automatically, filling in forms such as: creating a PA job, generating a monthly recurring invoice, adding a preferred payment method, assigning system coverage, determining the appropriate job work type, consuming or creating the first maintenance visit, and emailing a copy of the agreement and registration instructions for the member website upon completion (attached to their receipt from the field or through a custom email pop-up wizard in the back office).

These two projects, along with other efforts helping to automate workflows in WorkWave ServMan, have had an undeniable impact on Morris-Jenkins and their Priority Advantage program.



“

The Priority Advantage department's workload and workflow have been **dramatically altered by automating ServMan processes.** Now, just one full-time employee manages the accounts of over 27,000 members.

**Membership has increased by 22%**

since April 2018! New agreements are active in our system within 24-48 hours from sign-up, and we have far fewer agreements on hold while waiting for missing payment information or correct equipment.”





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## The RESULTS

-  **32% increase** in overall revenue growth.
-  **22% increase** in Priority Advantage members.
-  **25% more** calls in the Contact Center.
-  **24-48 hour activation period** for new Priority Advantage members, down from an average of one month.

“ Our Priority Advantage projects are some examples of many of the **ways the ServMan software has supported our growth and expansion**

in the Charlotte metro region. Our ability to quickly pivot and adapt to new challenges as they arise wouldn't be possible without the flexibility ServMan offers. ”

## Benefits of WORKWAVE SERVMAN

- **Custom-tailored** service industry software to fit your needs
- **Cloud-based** sales proposal tool and mobile app
- **Configurable** screens, processes, and reports
- **Incorporates** any of your unique business rules and workflow requirements
- **Complete inventory** and materials tracking with job costing
- **Fully integrated** accounting system



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