



CASE STUDY:
**Equipment
Depot**

Client Profile

One of the premier forklift, material handling and aerial lift equipment companies in North America, Equipment Depot, is moving all five of its Operating Companies onto Equip-Soft for its DMS/ERP software.



Equipment Depot® consists of five different independent operating companies located throughout North America. Each operating company has a different product mix and its own unique approach to its market. All of the companies were acquired by PON North America over the last ten years.

With over 1,750 employees that sell, service, rent and provide parts and training to over fifty of the top equipment brands, they needed a software system that could handle the complexity of their business.

The Challenge

In 2006, the Board of Directors of PON North America made the decision to get all five Equipment Depot companies on the same software platform to attain best practice operations across the business.

With five different companies on five different software platforms it made business sense to get all companies on one. Increasing the timeliness for this transition was the fact that Equipment Depot Ohio and Equipment Depot Illinois were on MTA which at the time wasn't supported. Having all 5 companies operating on outdated technology created an unmitigated risk.

While each company still makes local decisions, they all draw on the financial resources, experience and innovations from all of the operating companies in the group. They can

select from a short-term rental fleet of more than 5,000 forklifts, scissor lifts, boom lifts, telehandlers, skid steers and backhoes. With more than 900 qualified and trained service technicians Equipment Depot has demanding software needs that would be difficult for most software companies to meet.



The Decision Process

The decision process for making this software selection started with a needs assessment. PON North America retained KPMG to assess all five companies' as well as their headquarters needs. An RFQ went out to 16 companies and all 16 companies came back with proposals. The proposals were judged and weighted based on the quality of answers and whether the software would meet their needs.

An assessment group of 80 Equipment Depot staff from across all 5 companies evaluated the software demonstrations. An Executive team then visited each of the companies' headquarters to meet with the owners and executives of the software vendors to get a sense of whether the people part of the project would be a good fit.

PON North America/ Equipment Depot made the decision to purchase Equip-Soft for their ERP/DMS software. Brenie Bowles, ERP Project

Manager, points out that *"the highlight of the vote was that Equip-Soft has a future. And the integration with Microsoft was also an important element as we wanted to ensure that we were tied into products with a future, not legacy systems that could potentially not support us in five years."* Bowles points out that *"Industry software packages have a legacy of being home grown and don't have the resources that Microsoft does."*

The final decision for our business needs was based not just on technology but also on partnership.

"Our executive teams were a strong fit and the Chief Architect of EquipSoft, Dan Oughton, really understood the vision of where we needed our business to be"



The Solution

"We decided to stage our roll-outs so that we could better manage the resources on our side. Having been live at Equipment Depot Ohio since 2008, we are already realizing success. We're live in Ohio, we're going live in Kentucky now and we'll be going live in Illinois next"

The Benefits

When asked what key learning's have emerged from this process Bowles is very willing to share and let others learn from this project. He conveys two key points to companies in the selection process:

1. When selecting an ERP or DMS make sure that you are comparing cost transparently. Make sure you're comparing apples to apples. Some Software companies present items at a lower cost than they really are.
2. Training is essential and it needs to be as real as possible. He suggests training in real time on the floor so that people understand how things are working live – people need the opportunity to understand all aspects of the system.

The Future

Using technology to further business efficiencies is in the plans for PON North America and they are working with Equip-Soft on options around integrating Dynamics CRM, Sharepoint and Mobile Services.

"Using Dynamics CRM, Sharepoint, and Mobile Services in the future will create synergy within the companies. We will have shared services teams where everyone is working off the same system. For example, we want to follow the same accounting principles from a common chart of accounts. Having CRM integrated, Sharepoint portals for customers and Mobiles Services for our employees will bring greater efficiencies and it will give us incredible insight into the business." say Bowles

"Equip-Soft has a future and a solid long term business plan. It's important to be on a solid platform and not just a product."

Brenie Bowles

About Equip-Soft



Equip-Soft helps equipment distributors manage growth and improve efficiencies through its rentals, service, sales, parts, and fleet management software. We do this by matching up the best technology with the best business processes.



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