

# OLDROYD MAINTENANCE SERVICES LTD

Oldroyd Maintenance Services Ltd is one of the leading heating companies specialising in maintaining and installing systems in a range of commercial properties.



## INTRODUCTION

Founded in 1991, Oldroyd Maintenance Services Ltd is one of the leading heating companies specialising in maintaining and installing systems in a range of commercial properties. Over the years, they have built up an excellent reputation while working with customers across Yorkshire. They're a small team of highly skilled professionals who are dedicated to offer a service like no other.

## SUMMARY



### PROJECT

Despite the world of technology evolving and revolutionising, Oldroyd had become too accustomed to the old way of doing business. This way of working was not sustainable and was costing them a lot of time and money.



### SOLUTION

We came up with a two-part CRM system which consisted of a Web Application, and our bespoke flagship CRM system, Jobtracker. This helped to increase productivity while saving time and money.

## CHALLENGE

Despite the world of technology evolving and revolutionising, some businesses failed to keep up with the modern era of a digitalised world. Oldroyd was one of them. Oldroyd had become overly accustomed to the way businesses used to operate with piles of paperwork and tonnes of dried out pens. The Oldroyd team did not live in the twenty-first century and relied on paper to keep the business running. They would manually send invoices, and many aspect of their business required a lot of manual data input. They also relied on engineers to return to the office with the job details from being out on site. These details were then scanned and emailed or posted to the customer.



## SOLUTION

As a way to tackle this, we came up with the solution of Sharepoint, which allowed them to have a shared location for files. This helped to unlock their team's full potential by working on documents at the same time. This unique collaboration tool meant that they were transformed into a team that thrived on productivity and brought a new spark into their company.

We also implemented a two-part CRM system, consisting of our completely customised CRM system, "Jobtracker," and a Web application. Jobtracker is our flagship CRM application, that is customised for each client. Their office staff use Jobtracker log jobs, deal with enquiries, issue invoices etc. Using the data collected from this, Jobtracker can create custom reports to help provide them with an understanding of the ins and outs of the business.

The web application is used by engineers at Oldroyd when they go out to sites. The office staff assign jobs to them via Jobtracker, which then appear on the web application for each of the assigned engineers. Using the web app, the engineers can complete their jobs, enter appropriate data and any notes which are all saved to the cloud database and instantly accessible by the office staff through Jobtracker. This helps the team to run as efficiently as possible, saving time and resulting in them being more productive. This new way of working revolutionised how Oldroyd's engineers and office staff collaborated. It has introduced a modern way of communication and enabled Oldroyd to implement a flawless system to please their customers. This two-way system provided them with a powerful and advanced way to improve their quality of service they provide.



### ➤ Save time and money

Oldroyd saw a huge savings in time and money as a result of the new surge in productivity they had experienced, and they were now able to work more efficiently.

### ➤ Greater insight

The new systems enabled them to generate detailed reports on all aspects of their business, giving them a better understanding of their processes. This meant that they could now make more informed business decisions that were backed by data.

### ➤ Automated tasks

Oldroyd can now automate mundane processes tasks to help speed up their day, allowing them to focus on the aspects that are important in helping them achieve their business goals and objectives.

### ➤ Increased collaboration

With the combination of Sharepoint, Jobtracker, and Web Application, the team at Oldroyd can work and collaborate from anywhere. This encourages them to have more meaningful business conversations while also saving time on job details and sending important documents.

## GET IN TOUCH TODAY!

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