

## Lochinvar – Fired up for Success

### The Client

Lochinvar Ltd is a Banbury based company, specialising in the distribution of high efficiency Gas Fired Water Heaters and Boilers. Their products are sold and commissioned into commercial areas such as schools, leisure centres and hotels.

Lochinvar's products are known for their reliability, efficiency and cost effectiveness and all products are designed and manufactured for the specific needs of the UK market, having the CE and WRAS listings.

### The Challenge

In 2007 Lochinvar were looking to replace separate outdated CRM and Accounting Systems, plus a plethora of Excel based spreadsheets. Specifically Lochinvar needed a system that would provide them with accurate and timely management information that would solve three key business issues,

- To take care of all their current requirements and house all the data in one centralised database;
- To have the capacity and flexibility to cater for future requirements without major developments; and
- They wanted a system that would enable them to query this data and report to Management and Users in a timely and logical manner.

After reviewing a number of systems Lochinvar decided to implement Microsoft Dynamics NAV.

The challenge was to get data from various systems into the new centralised database, whilst at the same time streamline and cleanse the data and exclude any obsolete records. It was important to not just migrate the current data, but to transition only relevant data. The new system had new fields and where possible these fields had to be set up automatically, and a way of enhancing the data to allow for current and future growth had to be established.

“We needed a third party to be involved, as we had no one internally who had NAV expertise. Adept were recommended to us and we found they had the required expertise and knowledge required for this important system upgrade.” said Claire Jerome, Operations Manager.

“We had numerous complex issues and were disheartened with our existing Reseller so we tasked Adept with Project Managing the new system upgrade and ensuring the project was delivered on time.”

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## The Solution

Working closely with Claire and the Lochinvar Management team Adept took on responsibility for ensuring the smooth implementation of the new system. The Project aim was to coordinate with the Reseller and make sure that the new System went in accurately, smoothly and on time. Adept quickly realised that the planned go live date was impractical and needed to be put back one month to ensure that all Lochinvar requirements were catered for and the Reseller had time to complete the required development work on time.

The first step was for Adept to fully understand the Lochinvar business and their requirements as agreed with the Reseller for the NAV System, including any development and bespoke Reporting. Adept's experience with NAV Systems and their understanding of Resellers was paramount in helping the Project run smoothly.

Identifying and managing Lochinvar's internal training requirements for the new system was key to a successful implementation and included staff from Internal and External Sales, Warehouse, Purchasing, and Finance. Trial implementations were carried out and timescales agreed with the Reseller. The implementation and transition was a success and the go live date was met in April 2008.

Lochinvar immediately saw benefits in having one system to look after Finance, Sales, Stock and Purchasing, where all users could access all data from one central source. KPIs were presented via reports and screen enquiries, showing things like current actual sales figures on a month by month basis, plus the value of orders outstanding and orders shipped but not invoiced.

"Our business is now in a position to grow with a sound and accurate ERP System that ensures figures and trends are immediately available to help make those important business decisions." said David Pepper, Lochinvar's Managing Director

Over the following 12 to 24 months Adept was directly involved in developing the NAV System further, and several new important Reports were developed utilising SQL Reporting Services.

Claire Jerome said "Adepts involvement in the project was fundamental in us achieving the go live date, as we did not have the knowledge and expertise in house to move forward at the time. We had problems with the Reseller at that time in terms of communication and commitment and Adept helped to resolve those and to complete the integration. We have continued to make improvements to Navision since going live and we now have a great system that works for us and can continue to develop with us as our needs grow and change"

## The Outcome

Lochinvar switched to Adept as their full Dynamics NAV support partner in March 2010, and utilise Adept now for all NAV support and development issues. Lochinvar continue to develop their system and have recently gone live with the Jobs Module for control of their Service Department. Finally Claire Jerome says "With Adept as our Dynamics NAV Partner we feel strongly that we can meet all the demands of the business as we grow. We have a very capable System now, which has been enhanced by Adept and their knowledge of both our Business and NAV is very important to us."