

## SUCCESS STORIES

# Acumatica and Crestwood Modernize Operations for a Leading Elevator Company



“The best thing about working with Crestwood is they have their own software development team, so just about any need or challenge can be addressed with specially designed solutions.”

- **Lauren Clausman**  
General Manager



### COMPANY

Liberty Elevator Corporation

### LOCATION

New York, NY, Paterson, NJ and Hollywood, FL

### APPLICATION REPLACED

An elevator operations legacy system

### SOLUTIONS

Acumatica Cloud ERP and Advanced Commissions

## The Challenge

Liberty Elevator Corporation provides elevator services that New York, New Jersey, Pennsylvania and Florida building owners and property managers rely upon for all of their complex elevator needs. As one of the top elevator companies in the country, Liberty Elevator understands customers have unique needs and offers clients the freedom to choose.

The elevator business in general and Liberty specifically is very complex, with four distinct departments. Between construction, modernization, service and repair, these areas of the company must track monumental details and contracts.

The company simply didn't have the ERP functionality to address the multifaceted functions that provide expertise to more than 3,500 elevators across a wide geographical area. Their system did not offer support to the sales department, as it lacked a CRM. Much of the accounting was performed on spreadsheets. Estimating or quoting proposals lived on disparate desktops. Without a web-based solution, teams lacked quick insight to everything from who was due a commission when, to the status of projects.

A 35-year veteran of the elevator business, General Manager Lauren Clausman says, “We started looking for a platform that would offer more to our specific business and support all departments, manage project costing and ‘work in progress’ reporting and things like that. And we also were looking for something that had a CRM component to offer our sales team pipeline management.”

## The Solution

Though the legacy system Liberty Elevator was using was specifically designed for elevator companies, it had many limitations. It was too focused on running the service and repair operations of the company, which are just a part of the business. It didn’t offer anything for the modernization or construction side. With a staff of about 180, and a new office opening in Florida, the team had to get started right away with a better way to operate. Acumatica Cloud ERP provided the solutions that affected and improved the work of employees across the company in the offices and out in the field.

Acumatica added the team’s ability to have insight into project status, and to generate financial data much more transparently and quickly.

A CRM integrated to track sales and commissions impact the sales process to improve lead management and timely commission compensation.

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## The Outcome

Liberty Elevators now has greatly increased availability of data, with multiple ways of filtering and exporting information. This enabled an at least 10% reduction accounting expenses and a dramatic shift in efficiency for employees.

### Key Results

- Provided transparency into sales performance
- Eradicated need for VPN connectivity
- Accelerated accounting functions significantly
- Immediate visibility into cost budget analysis

As soon as Acumatica was live, finance teams were able to quickly generate reports to illustrate where projects stood in terms of cost against the budget, revenue earned, profit recognized on costs expended and other critical project accounting functions.

Sales teams utilized the new CRM component to track their work and understand commissions. With visibility into the outcomes of certain opportunities, they could focus on the right leads.

Whether selecting a customized elevator maintenance program, installing nonproprietary equipment, or providing a flexible agreement, Liberty Elevator provides knowledgeable recommendations to customers for various models and vintages of elevator equipment. Acumatica and Crestwood have changed the way the company does business. Clausman says “Crestwood was great at giving us tips and tricks for best practices along the way during our implementation. I really appreciate their expertise and support.”

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with innovative technology?

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