

Case Study: How Technology Helped Strengthen a Business

Overview

- **Business:** A multi-generational, family-owned, inventory-based business.
- **Challenge:** The owner, in his late 60's, was starting to think seriously about stepping back.
- **Goal:** The owner was hoping to transition ownership within the next five years.

The Opportunity

- Before transitioning ownership, the business needed to address some key challenges it was facing. The company had run the business using workarounds and manual processes that used several different systems with little integration. Inventory, accounting, order tracking, and reporting all lived in separate places, and it was creating more problems than it was solving. Errors were common, and the staff was spending too much time fixing them instead of focusing on customers and growth.
- The owner was also struggling to hire and keep younger employees. The outdated systems and the lack of a clear plan for the future were a turnoff for potential hires and left the current team feeling stuck.

The Solution

- We started by taking a step back and looking at how the business operated day to day. We reviewed how data was collected and reported, how orders were processed, and how decisions were made. It became clear that the tools in place, while familiar, were holding the company back.
- With the owner's input, we brought in a technology partner to help evaluate and implement an ERP system that could bring all the moving pieces together. The goal wasn't just new software, it was to give the business a system that worked *with* them, not against them.
- Just as important as the technology was getting the people on board. We worked closely with the owner and his team to make sure everyone was trained and felt comfortable with the new system. We also set up a process for team feedback, so employees could raise issues, share ideas, and feel part of the change, not just subject to it. That made a big difference in how the transition was received.

The Results

- Within a short time, things started to shift. The new system helped eliminate redundant tasks, reduced errors, and gave the leadership team better visibility into the business.
- **Profit margins** improved as operations became more efficient.
- With systems running more smoothly, the owner had the capacity and the confidence to bring in two mid-career professionals to help lead the company forward. The business was no longer reliant on one person managing everything behind the scenes, which made the idea of succession much more realistic.
- Most importantly, we were able to develop a formal succession plan that gave the owner peace of mind and created a clear path for the next phase of the business.