Lifeway Mobility Rapidly Deploys Acumatica Cloud ERP as Strategic Growth Platform

OVERVIEW

Lifeway Mobility supplies ramps, stairlifts, wheelchair lifts, transfer aids, and bath safety solutions to individuals and businesses. The company has grown through acquisitions and has plans to become the leading supplier of accessibility solutions nationwide. Frustrated with multiple siloed business applications, Lifeway Mobility deployed Acumatica ERP, gaining an affordable, cloud-based ERP that allows it to connect new offices quickly.

KEY RESULTS

- Shortened time to deploy new technology, rolling out new ERP to branches in just 30 to 60 days
- Gained real-time business insight, driving better, data-driven decisions
- Improved customer service with new field-service technology
- Obtained mobile access to data, critical for the geographically dispersed organization
- Acquired a connected platform for growth, eliminating six siloed applications
- Lowered IT expenditures by eliminating the need for on-premises hardware and security infrastructure

CHALLENGES

Lifeway Mobility supplies ramps, stair lifts, wheelchair lifts, ceiling lifts, transfer aids, elevators and bath safety solutions to individuals and businesses in multiple states through its seven offices. The Connecticut-based company was founded by Paul Bergantino, Tim Burfield, and Dave Hess, who recognized the potential for the growing healthcare niche, historically fragmented by mom-and-pop operational suppliers.

Founded in 2015 and backed by a private equity firm, Lifeway has grown through acquisitions and has plans to become the leading supplier of accessibility solutions nationwide. Over the past five years, the company has augmented operations in Connecticut and Rhode Island, with acquisitions in Illinois, Indiana, Massachusetts, and Minnesota.

After the first few acquisitions, it became apparent that the several disconnected software programs that ran the operation couldn't handle the scale and pace of the company's growth. The growing list of software systems only made it more difficult. "Because our offices were established through acquisition, each one came with a legacy set of tools, software, operating platforms, process and procedures. This made it a real struggle and incredibly complex to get consolidated statements and reporting," says Bryan Mullen, SVP Shared Services.

"We spent a lot of time asking (various offices) to export data to a common format so we could try to consolidate all the data," he explains. "The problem was none of the source systems represented data the same way. There wasn't any way to get an apples-to-apples comparison."

Multiple Disconnected Systems

Lifeway Mobility's headquarters ran on six software packages. "Most offices had QuickBooks as a system of record. For CRM, some used HubSpot, others Sugar. Most had a second platform for orders such as

Med Force or Proxy. Scheduling was handled through an Outlook or Google Calendar," Mullen says. "There was heavy use of Dropbox and other web-based document management providers."

None of the offices had an ERP system. "It soon became quite evident that to scale the business, the status quo wasn't going to cut it any longer," Mullen says.

SOLUTION

Newer Entrant Steals the Deal

The Lifeway Mobility team came within hours of signing with Oracle NetSuite when George Mackiewicz, owner of CAL Business Solutions based in Harwinton, Connecticut, suggested they look at Acumatica. "I was unaware of Acumatica prior to that," Mullen says. "At the time, Acumatica didn't have the name recognition that others did, but we agreed to take a look at it as CAL Business Solutions recommendation."

Acumatica's innovative pricing model, the mobile application for field service workers, and the ability to scale via the cloud impressed the team. "We really liked the usage-based pricing, which gives us the flexibility to scale and grow with the needs of our business," says Mullen. "The ability to implement the solution quickly and bring on new locations also fit well with our technology strategy to be location agnostic."

Speedy Implementation Times Six

Lifeway Mobility kicked off implementation and was live with its first office in just five months. "Having run large operations, and as CIO at a Fortune 50 company in the past, I've implemented a tremendous amount of technology over the years. None of them have been as smooth as Acumatica," Mullen says. "I attribute that to the leadership at Lifeway, the skill and business partnership with CAL Business Solutions, and Acumatica."

Lifeway spent time making sure the new business solution operated as expected before lighting up the rest of its locations. "The second office went live, then the third," Mullen says. "We were literally standing up a new location every 30 to 45 days. We paused for an upgrade and then rolled out the next two offices."

That pace is astounding when compared to Mullen's most recent prior experience, in which it took 2.5 years to implement a CRM system for a Fortune 50 insurance firm across a similar six-office footprint. "After two and a half years, we had only deployed one office, versus one year to roll out all six with Acumatica," he says.

Rapid and Remote Implementation

But wait, there's more: Lifeway Mobility rolled out its largest office, the Chicago branch, during the Covid-19 outbreak, all done remotely. "We are all working remotely, not being on-site and being able to implement a new solution, during this time, is a testament to the way this can be done," Mullen says. "All the training, data migration, and post-launch support was done entirely remotely." Lifeway Mobility's Minneapolis office has since also deployed Acumatica remotely.

BENEFITS

Real-Time Data Informs Operations

"The implementation of Acumatica allows us to look at our metrics on a day-to-day, real-time basis. We can see what our operational impacts are which allows us to make better decisions during this chaotic time. None of that was possible with our prior systems," Mullen says.

Four key metrics drive Lifeway Mobility's business:

- New business opportunities
- Estimates and value they create
- New orders or activations
- Completed orders

"We can see those four measures trending on week-by-week or day-by-day basis, which allows us to make better decisions," says Mullen. The new platform also eliminated much of the manual work and effort it took to consolidate data from disparate systems, turning hours of work into a mere click of a button.

![lifeway mobility logo]

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Visibility for All Employees

"Our field employees who are delivering and installing critical equipment into people's homes are staying safe and remain fully connected using the Acumatica mobile application," Mullen says. The field team now arrives at a customer's site with all the photos, change orders, instructions, and information they need, making them more informed and efficient. "We're not spending time looking for documents or making phone calls or, heaven forbid, installing something that does not meet customer expectations. Everything is at their fingertips, and that's been a huge benefit. Hours of work on a weekly basis have been avoided, resulting in more time with the customer providing a better customer experience," says Mullen.

Lifeway has created extensive financial and operational dashboards specific to employee functional roles to provide actionable information across the company. "We're asking them to look at daily metrics to understand what's happening across our business and how we are responding to the events going on around us. They can see trends, see how their actions impact our business overall, and understand why the senior leadership team is making the decisions they are, especially during this pandemic."

Pivot to Work-From-Home Quickly, Securely

Lifeway Mobility's data is hosted in the cloud by Acumatica and Amazon Web Services and allowed Lifeway to pivot to work from home without as much as a moment of interruption, Mullen says. Acumatica's cloud-based platform eliminates any worries about VPN connections, software client installations, server capacity, network intrusion, data center security, and maintenance. He adds, "we are very confident that the data we maintain on behalf of customers is secure. Each of our seven locations has a zero IT footprint. We rely on the security structure managed by Acumatica and AWS to keep our data safe."

Acumatica, a Strategic Growth Asset

Before the global pandemic, Lifeway Mobility executives planned to double the company, mostly through a combination of organic growth and acquisitions. They still hope to attain that goal, but only because they have implemented Acumatica.

"Personally, I couldn't do my job if I didn't have the Acumatica platform," Mullen says. "I couldn't manage all those locations on their legacy systems. With Acumatica I have visibility into the data and insights into operations through dashboards and trigger notifications that allow me to respond and support teams across our various branches."

"We have a strong pipeline and financial backing, so we do expect that growth to continue," he adds. "Acumatica is enabling our growth through the implementation process. We are able to bring a new organization onboard, share with them our tools, and have them integrated within 30 to 60 days of closing a deal, which is phenomenal."

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