

## CoachComm Makes the Right Call Deploying Acumatica Manufacturing Unlocks Data-Driven Growth

### OVERVIEW

Communication headset maker CoachComm grew as much as it could using legacy technology, which required manual data manipulation between four major software applications. Although hesitant to move to a modern system, executives realized much of the manual data entry could be automated and eliminated. Deploying Acumatica Manufacturing streamlined operations and made CoachComm more efficient while providing operational visibility and data executives use to make better decisions.

### KEY RESULTS

- Acquired a single, connected platform offering end-to-end visibility
- Gained new real-time data, improving decision-making
- Cut inventory carrying costs by 15% with optimized inventory management
- Eliminated eight hours of daily spreadsheet manipulation by automating Material Requirements Planning (MRP)
- Streamlined workflows and reduced errors due to manual data entry
- Boosted productivity by automating repetitive tasks, saving valuable time
- Gained self-service tools giving managers real-time access to analyze data more deeply
- Shortened sales quoting process with access to critical information that allows sales to better track shipments and update customers

### CHALLENGES

There comes a time in organically growing mid-sized firms when executives realize the processes they use can't scale any further. At CoachComm, which makes headsets for coaches, broadcasters, and industrial applications, owner Peter Amos recognized his legacy technology was throttling company growth. Like many small business owners, he had heard that ERP implementations could take years and cost millions, and often ran way over budget, misconceptions Amos says took him years to overcome.

But reviewing how the Auburn, Alabama-based company manually processed data through various legacy applications forced him to overcome his hesitation. Most telling was how CoachComm attempted to manage its MRP manually, which required a full-time employee.

"What we do is relatively complex," Amos says. "We're not building rocket ships, but we're probably close. We build circuit boards in-house with over 3,000 parts per unit. Managing all those parts to make sure we had what we needed at any given moment for all the different circuit boards that we build is quite the task."

CoachComm's headsets also include plastics, metal components, and other materials. Some of its products are make-to-order while others are make-to-stock.

The company sells direct to coaching clients, which include hundreds of high schools and colleges, the NFL, and the Canadian Football League. It also sells through distributors to local and national broadcasters such as NBC's 30 Rock, The Tonight Show, and MSNBC, to name a few customers. CoachComm also stocks inventory to support its field service team.

"Our people were doing a darn fine job manually managing it, but MRP was an impossible task," Amos says. To make sure they never ran out of parts, the company overstocked its parts, and inventory ballooned. "We just overcovered ourselves on inventory because we were so scared we were going to run out something instead of actually knowing what was going on," Amos says.



#### Company

CoachComm  
[www.coachcomm.com](http://www.coachcomm.com)

#### Industry

Manufacturing – Communication Headsets for Coaches, Broadcasters, and Industrial Applications

#### Number of Employees

Approx. 100 full time employees

#### Location

Auburn, AL

#### Products

Acumatica Advanced Manufacturing with:

- |                                |                            |
|--------------------------------|----------------------------|
| • Monitoring and Automation    | • Field Service Management |
| • Inventory Control            | • Equipment Management     |
| • Multiple Tenant              | • Acumatica Payroll        |
| • Warehouse Management         | • Case Management          |
| • MRP                          | • Engineering              |
| • CRM                          | • Change Control           |
| • Shipping Carrier Integration |                            |

#### Customer Social Sharing Details

- |   |  |
|---|--|
|  | <a href="http://www.facebook.com/CoachComm">www.facebook.com/CoachComm</a>   |
|  | <a href="http://www.instagram.com/coachcomm">www.instagram.com/coachcomm</a>   |
|  | <a href="http://www.x.com/coachcomm">www.x.com/coachcomm</a>   |
|  | <a href="http://www.youtube.com/channel/UCdz3X1ZyZksSflPWmYpofA">www.youtube.com/channel/UCdz3X1ZyZksSflPWmYpofA</a> |
|  | <a href="http://www.linkedin.com/company/coachcomm">www.linkedin.com/company/coachcomm</a>                           |
|  | <a href="http://www.vimeo.com/coachcomm1">www.vimeo.com/coachcomm1</a>   |

#### Partner Details



Copious Solutions  
<https://copiouserp.com>

One person manually managed the MRP spreadsheets, which included data from purchase orders, service orders, inventory levels, and future work orders. After adding the new data, an update took 45 minutes to an hour to run.

"Then you have to decipher everything and set priorities," says Gardner Swindall, Senior Supply Chain Manager. "Our inventory planner had to go look at what he had to build, and when the need-by dates were. Then we'd have to run (the spreadsheet) again because the materials needed weren't in the spreadsheet."

"We run up to 25 levels of components for our finished goods," he adds. "That process was for pre-assemblies, which went into sub-assemblies, and all the way down to the circuit board level."

"Every day we were running this manually," Swindall continues. "We got to the point where we were trying to run it three times a week, but if we did that, we might miss orders so we had somebody running that every day."

## Disconnected Applications

CoachComm struggled to manually reconcile data in its standalone systems, which included its Aptean Southware legacy ERP system, Infor CRM (formerly Sales Logix), and Agile as well as a few other applications. These on-premises applications contained historical data spanning nearly 30 years. However, the data was not uniform. Customer names, part numbers, and other information were not consistent within those applications and required a lot of manual reconciliation for every process in the manufacturing organization.

"I dreaded changing from Southware; everything about changing systems was abhorrent to me," Amos says. "I've heard and seen so many bad stories of companies moving, even if it was from one system to another. It got to the point where our software, as fine as it was, was just not adequate for our type business and what we do. Finally, we just decided we had to take the leap."

The disconnected systems hampered information exchange, and assembling data for sales or customer service required extra work, executives say.

"From a sales perspective, the CRM had no view into inventory, shipping details, or other data we might want to see like support tickets," says Mike Whitley, Vice President of Sales. "We spent an inordinate amount of our time combing through information, which was not the best use of our time. Even when I got the information from other systems, the integrity of the information was suspect at best."

The sales team used the CRM system to send orders to customer service, which operated in Infor CRM. "They had to completely convert those part numbers into another set of part numbers and go in manually," Whitley says. "We also didn't have visibility all the way through support tickets."

Customer service, technical support and the field service teams work under one umbrella but have independent functions. Each team lacked visibility into service orders to understand what was done during service calls. Instead, they had to track down the person who performed the service to ask what was done.

For a company that prides itself on having the best customer service, delivering information and products to customers that always need fast turnarounds was becoming problematic.

A lack of information also hindered the shipping department. Swindall says Aptean Southware lacked checks and balances, which sometimes resulted in negative inventory draws. The shipping department didn't have insight into returns or notifications if an item was out of stock.

Amos says he lacked the deep financial data he needed to make the best decisions. "Without data, you don't know how you're performing or how to adjust how you're performing," he says. "You need information to know where you're at."



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– Peter Amos,  
Owner,  
CoachComm

## SOLUTION

### Affordable, Open, End-to-End Manufacturing ERP

CoachComm evaluated several of the leading brand names in the ERP industry. “We looked at some of the big names but wrote them off pretty quickly,” he says. “They were too big, the Oracles of the world, and SAP. We did look at NetSuite briefly and decided it was just more than we wanted to try to chew off.”

Amos hired an outside consultant to help narrow the choices, and he recommended Acumatica. CoachComm executives learned Acumatica offered a unique licensing model, an end-to-end solution that seamlessly united all aspects of its operation while also allowing third-party applications to connect seamlessly.

Amos chose Acumatica because he “Just liked the overall value proposition. It had the pieces we needed, and seemed to fit what we needed the best, including the value from a financial standpoint, how much it cost, and how it was structured financially,” he says.

### Normalizing Data Leads to Smooth Go-Live

CoachComm worked with Copious Solutions to deploy Acumatica, and also rehired Alan Walker as Executive Vice President to help CoachComm normalize and unite its disparate information from its four legacy systems. “I hired Alan because I knew that he had the skills to help get us through that process, and to have somebody on our side to lead this,” Amos says.

It took CoachComm a year to unite and normalize 30 years of data to a point they felt comfortable, but it paid off in a smooth go-live.

“When we did go live, we were able to continue working and we didn’t miss a day, not even one day of shipments. We were able to just keep moving,” Amos says.

“Overall, I’m pleased that we survived it,” he adds. “There’s been so many horror stories of moving to new systems. It’s a testimony to the group effort, but Alan was the head of that... he had to unite that data.”

Although Walker had worked at CoachComm previously, he first had to learn how they operated and how the different software pieces interacted. He also had to learn about new-to-him CoachComm products, and synthesize the data into a common whole. “We had this number over here for a manufacturing identification number, and we call it something else here, and something else there,” he explains. “That was very confusing.” He leaned heavily on several key employees to help him understand the information in Infor CRM, Aptean SouthWare, and Oracle’s Agile PLM systems.

“The biggest piece was figuring out the supply chain and shipping,” Walker says. “Every afternoon I would send Gardner an invite for 8 am the next morning because I had questions about what I had learned the day before. There is zero way I could have done this without him. It would have 100% been a failure.”

## BENEFITS

With Acumatica Manufacturing deployed, CoachComm executives have accurate, real-time data that they use to run the company much more efficiently.

“We see more clearly the different pieces of our business,” Amos says. “We can plan our manufacturing, carry better inventory levels, and see everything we need to do to run the business better.”

CoachComm no longer ties up its cash or warehouse space carrying excess inventory, and does not run out of critical parts, which it did frequently before implementing Acumatica.

“As a business owner, just getting to the other side of this successfully has been a tremendously good thing,” Amos says, adding managers are monitoring data and using it to do their jobs better.

Having data in a single system and harmonized eliminated many hours employees previously spent hunting and translating data.



“With the MRP, we can see where we might combine batch quantities, where we might be able to reduce costs, do blanket orders, and save on shipping. Acumatica has been pretty eye-opening for us.”

— Gardner Swindall,  
Head of Supply Chain  
CoachComm

## Improved Quoting and Faster Customer Service

Sales is much more efficient, and making much better use of its time when the team creates quotes, tracks customer shipments and pulls up historical documents, says Whitley. “The Acumatica app is very intuitive, easy to use, gives you good information, and is available at your fingertips. The team has access while they’re traveling. We can also look up information by territory, by region, by inside reps, outside reps, and build groups and filters for everything that’s under their customer umbrella.”

He praised the sales dashboards they created. “It’s an invaluable tool that gives us instant access to the metrics we want to see and track all in one place.”

The quoting process takes less time, and Whitley can now view customer, division, dealer, and distributor details—insights he didn’t have previously.

## Streamlined Supply Chain and Shipping

Having more and real-time data about the company’s supply chain has given Swindall greater visibility into orders scheduled, produced, and shipped, which he didn’t have previously. “We’ve been able to go in by vendor and set our lead times which we didn’t have before,” he says. “We can now put a lead time on a part, depending upon on who we are getting it from.”

Deeper insight into its vendors has allowed the company to review price histories, and armed with that information and other data, CoachComm has started forecasting. “Having forecasts that drive MRP allows us to see where we might combine batch quantities, where we might reduce costs, and where we can leverage blanket orders to save on shipping,” Swindall says.

CoachComm connected Starship to Acumatica, which allows sales to gain shipping confirmations and see where shipments are in transit. “Using Acumatica has been pretty eye-opening for us, and we look forward to utilizing all the tools that it offers,” he says.

Starship, one of many third-party applications that seamlessly connect to Acumatica also streamlines rate shopping, which helps the company save on shipping costs.

## Acumatica: Easy Data Import, Export

Walker praised Acumatica’s developers for the way they designed the software, making a flexible, easy-to-use platform that allowed him to extract and input data effortlessly. “Acumatica’s import and export scenarios are just phenomenal,” he says. Instead of requiring IT departments to work behind the scenes with SQL and ingest data directly into a table, Acumatica does all that for you, he says.

Walker also praised the platform’s multi-tenant functionality, which he says was invaluable, as well as its searching functions, and flexible personalization options. In Acumatica ERP, a single instance of the application can serve multiple tenants, which represent separate companies or divisions executives might want to keep separate. Housed in one platform, Walker doesn’t have to sign in and out if he needs to work in a different division, saving him time and frustration.

## Platform for Unrestricted Growth

With every department now on a single, cohesive, and intuitive platform, CoachComm is rolling out additional Acumatica functionality and modules. The company plans to add limited e-commerce capabilities, mobile expense management, and a customer portal.

“We made the right decision to go with Acumatica,” Amos says. “It’s been validated by the fact that everybody loves it. The software is well designed, comprehensive, and easy to use.”

