

Why three cleaning contractors swapped their existing 'all-in-one' systems for Templa CMS

When **Office and General** (annual turnover £40m), **Contract Cleaning and Maintenance** (£8m) and **City Cleaning** (£3m) decided to switch respectively from **Sage**, **Cleanlink** and **Target Control**, it was because they wanted to address some urgent needs of their rapidly expanding businesses:

- the need for their field management to be able to view timesheets remotely from their laptops and in real time throughout the pay period, so as to keep on top of their main cost centre
- the need to analyse their business in the way they wanted without constantly downloading data to spreadsheets
- the need for 'all-in-one' software whose modules were fully integrated, in other words interfaced directly with one another and shared the same data
- the need for an increased level of support and development from their supplier

Jonathan Smith, MD - Office and General

🗨️ We wanted a budgeting and analysis capability that would actually allow us to figure out which customers were profitable. In the past it was like driving through fog with the headlights off. It was alright when we were travelling at 5mph, but now we are travelling at 70mph we need to see more clearly! At the same time our preparation for payroll RTI with Sage was shaping up as a major investment in its own right, forcing the Board to think hard about the search for an integrated software system to run all the company's key business processes. 🗨️

Alastair Fox, Executive Director - Contract Cleaning and Maintenance

🗨️ During the last eighteen months we have come to realise that we need much better visibility of our key cost elements, notably payroll, and greater flexibility to analyse our business the way we want, both of which Templa CMS delivers as part of its core system. We also liked the new client-facing elements, Quality Audit, Customer Portal and Mobile CMS and the way these are genuinely integrated to the contract management system. 🗨️

Mike Bundy, MD - City Cleaning

🗨️ Any further growth of our company is being hindered by the lack of an integrated software solution. All we can foresee is increased administration and paperwork as the turnover increases. Templa CMS will allow us to manage our contracts from one central database, put us in full control of our budgets from site level upwards and give us proper visibility of our stores warehouse. But most importantly it will streamline our payroll by allowing our field team to access timesheets remotely on their laptops and view payroll data in real-time. 🗨️



TEMPLACMS

Fully integrated management software for cleaning contractors

What happens when I switch to Templa CMS?

Initial Consultation Meeting

After an initial conversation to understand your key requirements, objectives and business challenges we meet you at your offices to demonstrate how Templa CMS will streamline your business.

Project team

The **Templa Project Team** comprises a **Sponsor (Director), Project Manager and Technician**. The switchover to Templa CMS from another software system is relatively straightforward provided you identify a competent manager, ideally from your Finance or IT departments to act as the chief focal point for implementation. This person should be supported by a Director level sponsor to ensure the necessary resources are made available.

Hardware

Your IT staff (in-house or outsourced) review your IT infrastructure against a published guide on minimum technical requirements. However, Templa CMS is a total **Microsoft Windows and SQL Server** solution, meaning that it is highly likely that existing technology is already in place and users are fully literate in its use, albeit a review for currency of the technology may have to occur.

Business Process Review Meeting

Once you have decided to go ahead we meet you again to review the key business processes covered by the Templa CMS modules and how you will manage them in future using the software. The **Business Process Review (BPR)** is a fact gathering exercise to establish information relating to your company and its business and to understand and document your company's full requirements in relation to the Templa CMS system.

Installation and Training

We agree a convenient installation period with you, usually lasting five weeks, during which we transfer all your contract data to the new software database. Using the findings of the BPR, the initial database configuration is completed in preparation for data migration. Phase one is typically **Payroll**, followed by **Billing and Accounts**, with data extracts taken from the existing system(s) and used to create customers, sites, contracts, employees, contracted billing arrangements and outstanding transaction balances in Templa CMS. Data integrity is reviewed at each stage of the data transfer.

Templa CMS is initially run in parallel to your existing systems to provide you and your staff with reassurance that the software is delivering accurate results. After full training, you undertake parallel run data entry and processing and Templa attend onsite to assist with pay run reconciliation, verifying Templa CMS to the penny against the incumbent system(s).

Further phases

Once payroll, billing and accounts are installed, we work with you to migrate costing and pricing data for cleaning and washroom products into the **Stores** module and details of your periodic schedules into the **Work Bills** module. We then provide you with additional training on **Budgeting and Analysis**. Our package of four client-facing modules, **Service Point**, completes the full installation.

Post Go-Live

Our implementation team handover your installation to our dedicated help desk staff, who then provide you with support for your day-to-day queries.