

# NLP Teams Up With PNW Equipment for Successful Accounting Software Implementation, Increasing Efficiencies Among Stakeholders



## THE PARTNERSHIP

**P**acific Northwest Equipment, Inc. (PNW) came to Northlake Partners (NLP) looking for a partner who was not only capable of migrating PNW from their combination of Quickbooks and Sage FAS to a streamlined, single accounting solution, but was also willing to get to know the ins and outs of their business and had a proven track record in the success of doing so. Though not part of NorthScope's typical target markets, PNW sought out NLP thanks to a referral from a privately-owned Seattle-area-based IT support company they worked with. The strength of the referral combined with NLP's alignment with what PNW was looking for allowed PNW to feel confident entrusting NLP with their project.

## THE PROJECT

**W**hile PNW's main goal was to streamline their accounting from two disparate systems into one, their complete priority list for NLP included providing:

- A new chart of accounts
- Better automation of monthly invoicing
- A "share portal" tool the PNW sales team could use to look into and/or reference customer and equipment information without disrupting or accidentally changing the underlying accounting information
- Integrated equipment depreciation schedules in one system to prevent needing a separate fixed asset system for that process
- Better accounting logic, such as better item code naming/listing conventions for various types of sale and lease equipment and related ancillary service offerings (repairs, cleaning, trucking, painting, handling, storage, etc.)
- An accounting system that offered better remote access and performance as well as support for multiple users
- Long-term customer support to the team for additional training, report building, fixes, updates, etc.

To achieve these deliverables, NLP began by first interviewing PNW's software stakeholders to get an objective view of the scope of the project. This step was key in defining the project's requirements in order to provide a documented Solutions Plan that detailed the implementation required to meet PNW's needs.

## THE RESULTS

According to PNW Vice President, Terry Thomas III, "In short, NLP and our team made a shared investment in the quality of the up-front analysis of our project to better assure the likelihood of a successful software development and integration experience. Suffice to say, the results were impressive and did not require much post-implementation follow-up work. Our accounting software is reliable and performing as, if not better than, expected. All the key initiatives that we set out to address were met. The software solution that NLP created for us has led to greater customer account transparency across the office's software stakeholders and has led to greater all-around efficiency among all users." Additionally, the solution implemented by NLP resulted in:

- The PNW sales team being able to quickly reference the value of their equipment to speed up their ability to provide accurate sales quotes and increase profitability
- The operations staff's improved ability to more quickly identify what customer a particular piece of equipment belongs to for better tracking
- Better automated invoicing capabilities that have increased the quality of PNW's accounting team's invoicing process in the eyes of their customers

## THE REVIEW

"Northlake Partners' quality analysis of our company's accounting and related operating challenges were tremendously insightful in helping us to develop an improved accounting software solution that has yielded numerous operating efficiencies and provided us with a better platform to help us manage and grow our business. The Northlake Partner's team is knowledgeable, responsive and results-driven; we couldn't ask for any better company to work with when it comes to reliable service and support of our accounting software."

– Terry Thomas III, *Vice President*

## ABOUT THE COMPANY

Pacific Northwest Equipment Inc. (PNW), was established in 1980 as a Seattle area cargo container and intermodal equipment sales and leasing company. PNW has since expanded its intermodal equipment sales and leasing operations to serve Washington, Oregon, Idaho, Alaska, Hawaii, Canada and the Western Pacific. PNW is also recognized as one of the world's leading designers and providers of specialty new-built cargo containers and intermodal equipment. PNW continues to advance intermodal innovation and holds many North American patents in intermodal equipment design. The company's sales/leasing operations largely support the varied intermodal equipment needs of a diverse array of Shipping, Barge, Construction, Trucking, Rail, Waste Handling, Mining, Oil & Gas, Aerospace, U.S. Military and Large-Scale Retail customers. Simultaneously, the company is one of a very small number of U.S. companies that designs/contract manufactures intermodal equipment solutions tailored for the varied uses by each of the aforementioned industries.