

After initial DocuWare installation, Lohmiller & Company expands DocuWare use to nine departments within three years; transforming the way it conducts business by improving workflows, productivity and efficiency.



**Brenda Erickson, Credit Manager,  
Lohmiller & Company/Carrier West, Denver, CO**



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- Location:** USA
- Industry:** Service Provider
- Deployment:** Hybrid
- Department:** Accounts Payable, Credit Department, HR, Shipping and Receiving, Warranty Division, Commercial Sales, Controls Department, Marketing Department, Parts Department

**Denver based Lohmiller & Company/Carrier West is the largest independent HVAC solutions provider in Colorado. The company provides comfort to the community and improves people's lives as the result.**

Established in 1991, Lohmiller & Company/Carrier West provides the best equipment brands, parts and supplies to over 5,000 customers who serve the HVAC needs of the residential and business communities throughout the region. With 200 employees and four locations, the company has been honored with Regional and National Best Workplace Recognition honors, going above and beyond in winning the hearts and minds of employees. Part of that achievement is based on introducing advanced technology. The advancements help achieve exemplary engagement. DocuWare was introduced in 2018 as a digital storage system to reduce paper usage and they experienced immediate benefits. "Just in my office, I had five file cabinets, each five feet tall and six feet wide, full of paper documents. Every office wall had a file cabinet along it," says Brenda Erickson, the company's Credit Manager. "Now I have space for a table and chairs to host smaller meetings."

#### **DocuWare improves workflow**

Lohmiller & Company/Carrier West quickly recognized that DocuWare also improved workflow and

efficiency. The company relies heavily on email communications, and task oriented requests were sometimes overlooked in the sea of electronic information. DocuWare workflows solved this problem by allowing the use of task notifications with embedded reminders. Now managers receive a task notification, open and act on them. There is also an audit trail of what requests are sent to whom and when. "It alleviates emails as a tool for tasks, which is unbelievably helpful for our business - we became more productive," says Erickson. When asked about implementation and training, she said "Initially, I was reluctant to let go of paper files, especially legal agreements relating to our customer's financial obligations. Part of that is because we were infected with a virus in 2013 and lost a previous internal electronic storage system. DocuWare is safe, and I would never go back to a paper system. Once people overcome their natural fear of change, and with the training assistance of our Toshiba partners, adaptation is quick and using it is actually fun!" Today, the company stores hundreds of thousands of documents digitally.

#### **DocuWare for every department**

Within only three years of the initial install, the company had expanded its use to nine departments in total, adding Shipping and Receiving,

*"I don't know if we can calculate the time and energy we save on using DocuWare. It's priceless."*

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Commercial Sales, Warranty Division, Controls Department, Credit Department, Marketing Department, Parts Department and Human Resources. "Once DocuWare concepts were embraced, we realized what a prominent place it could have, and now does have, in our business. As the DocuWare Product Champion and Project Implementation Leader, it has been exciting and fulfilling to watch the changes take place."

Now DocuWare Forms are used to kick off workflows that are a part of daily operations. All of the workflows in place are designed to speed productivity and minimize followup. Departments that collaborate with workflow tools include:

**Human Resources:** Connects HR with Hiring Managers, Payroll, IT and Senior Management concerning hiring and compensation adjustments.

**Accounts Payable:** Links employees with Managers and AP for reimbursement of expense reports.

**Pricing/Marketing:** Provides automation between Pricing, Management and AP for seamless credit memo entry.

**Audit Requirements:** The entire company collaborates on storing the documents necessary for corporate compliance audits. Information can be found in one place in minutes or hours instead of days or weeks.

### **Keeping the teams connected while remote**

Lohmiller & Company/Carrier West was designated by the State of Colorado as an essential business during 2020, allowing the business to continue operating as normally as possible. DocuWare workflow features enabled staff working from home to keep communicating and working efficiently. The technology has allowed them to support a permanent hybrid working environment.

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