

Customer Story

ACTION ELEVATOR

Discover how Action Elevator partnered with **FIELDBOSS** and **Liberty Advisor Group** to replace an aging platform with a scalable foundation built for PE-backed growth, multi-entity expansion, and diligence-ready reporting.



COMPANY

Action Elevator

INDUSTRY

Elevator Contracting

LOCATION

Millersville, Maryland, US

THE CHALLENGE

For years, the software friction at Action Elevator was manageable. It looked old and felt old, but the staff was familiar with it, and things got done. So, they carried on. Then the growth targets changed.

Scaling from hundreds of units under management to thousands, across multiple geographies and potentially through acquisition, raised a set of demands the existing platform simply could not meet:

- Producing clean, accessible data on demand
- Surviving PE diligence processes without heroic internal effort
- Onboarding new entities without grinding core operations to a halt

“We could see that if we wanted to keep growing, we couldn’t keep doing it the same way,” said John Marshall, Jr., who leads Action Elevator’s operations. “With all the spreadsheets, texts, and manual workarounds, it just wasn’t sustainable if we wanted to retain our high service standards.”

Loading a new entity’s data into the old system was onerous. Data extraction was slow. The platform couldn’t produce the reporting that PE oversight demands, and it was never going to be configured to do so. The real question wasn’t whether change was needed. It was about making the change without dismantling what the company had spent years building, and without burning out staff or losing customers in the process.

BACKGROUND

Action Elevator is an independent elevator contractor with a long-standing reputation for outperforming larger competitors through exceptional service quality and hard-earned customer loyalty. With H.I.G. Capital on board as their second private equity partner, Action Elevator was well-positioned for aggressive growth across geographies and unit counts, and potentially through acquisition. The platform supporting their operations, however, was not.

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Action Elevator

WHY ACTION ELEVATOR CHOSE FIELDBOSS

Action Elevator evaluated its software options. Salesforce was on the list. Others were too. What made FIELDBOSS the answer wasn't a feature checklist. It was a set of factors that, taken together, reduced the risk of what is always a high-stakes decision. Here's why they chose FIELDBOSS:

- **The Microsoft Foundation**

Built on Dynamics 365, FIELDBOSS carries the credibility of a platform that isn't going anywhere. "We had no fear that it was going to close its doors in a year," Marshall said. For a PE-backed company preparing for future diligence cycles and eventual exit, platform stability matters more than most buyers say out loud.

- **Flexibility Without the Blank-Page Problem**

Some platforms built for the elevator industry are rigid by design. If the feature isn't in the box, it doesn't exist. FIELDBOSS sits on a configurable foundation, which meant Action Elevator could shape the platform to fit how they actually operated, rather than reshaping their operations to fit the software. "If we can imagine it, theoretically we can get there," Marshall said.

- **The Commitment That Comes After**

"Somebody wasn't selling us a piece of software and then saying good luck," Marshall recalled. For a company moving an entire operation onto a new platform, that distinction matters. The fear of being left on an island after signing is real, and it's legitimate.

THE STEP MOST COMPANIES SKIP

Selecting the right platform is one thing. Successfully implementing it is another. The gap between those two outcomes is where most projects stall, and it almost always comes down to the same root cause: no one owns the space between the vendor and the business.

H.I.G. understood this. They brought in Liberty Advisor Group, a Resultant Company, specifically to own that space.

"We didn't have the bandwidth internally to fully dedicate resources to manage the program from a day-to-day perspective," Marshall explained. "We're elevator people, first and foremost. We solve elevator problems. We do that very well."

What Liberty Advisor Group built was a program management structure that sat alongside all three parties simultaneously, maintaining separate touchpoints with FIELDBOSS, with Action Elevator, and with H.I.G. The goal was ensuring everyone stayed aligned on the same outcome, with no party operating in isolation.

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THE STEP MOST COMPANIES SKIP

“There’s language Corey and his team speak that I just don’t speak,” Marshall said, referring to FIELDBOSS VP of Operations Corey Barss. “Michael was better at interpreting for us, holding us accountable on our side, and holding the FIELDBOSS team accountable for the asks we had of them.”

Atkinson’s firm works across large ERP platforms, including SAP, NetSuite, Infor, and Dynamics 365, with no vendor relationships that would color his assessment. He arrived after software selection was already complete, and what he found reinforced Action Elevator’s decision.

“It was pretty evident that Action Elevator made the right choice,” he said. “FIELDBOSS being built on Dynamics 365, we see large organizations across our portfolio moving to it. It’s out there, it’s proven, it’s not going anywhere anytime soon, and it’s scalable.”

The implementation ran eight to nine months from start to finish. It came in on time. It came in on budget.

GO-LIVE AND ON THE GROUND

After months of planning, configuration, data migration, and training, there is a day when you shut off the old system and turn on the new one. The preparation leading up to it determines whether hard becomes merely stressful or genuinely damaging.

At Action Elevator, both Liberty Advisor Group and FIELDBOSS were on-site when go-live arrived. Not available by phone, not monitoring remotely. Present. The FIELDBOSS team stayed through the entire first week, running daily check-ins as the team found their footing on the new platform, stepping down in frequency as confidence grew.

“No one felt like they were alone trying to figure the system out,” Marshall said. “I can’t imagine doing it without staff being on site to troubleshoot and stabilize the systems in that first couple of weeks.”

But the most important factor on go-live day wasn’t the vendor. It was Action Elevator’s own leadership. Marshall and his co-leader Frank were in every training session, not dipping in to signal support and then stepping out. They lived the transformation alongside their people, and that set a tone no amount of vendor reassurance could have replicated.

“All change is hard,” Marshall acknowledged. “But the buy-in we got from everyone, because they saw where we were going and the intentionality with which we were doing it, we weren’t just throwing it at them and saying sink or swim.”

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THE RESULTS

The implementation delivered on its core promise: a platform built for the business Action Elevator is becoming, not just the one it was. Reporting that once required painful manual reconstruction is now accessible on demand. Sales activity is tracked in a formal CRM for the first time, creating a visible, auditable link between field recommendations and revenue. For H.I.G. Capital and any future ownership group, the platform delivers diligence-readiness that is built into how the business runs, not scrambled together when the moment arrives.

ON-DEMAND REPORTING

Before FIELDBOSS, producing the kind of clean, structured data that PE oversight requires meant heroic internal effort and slow manual extraction. Now, reporting is accessible on demand, giving leadership and investors the visibility they need without disrupting day-to-day operations.

FIELD TECHNICIAN VISIBILITY

Mechanics now have mobile access to scheduling information, customer history, and parts requests, with real follow-through. When a technician flags something, they can see it getting actioned. That closed loop builds trust in the platform from the ground up, across the people who use it most.

SALES TRACKING AND REVENUE VISIBILITY

For the first time, sales activities are captured in a formal CRM, creating an auditable connection between field recommendations and revenue. What used to be anecdotal recognition at the company Christmas party is now measurable data.

ACQUISITION AND DILIGENCE READINESS

Onboarding acquired entities under the old system was slow and operationally disruptive. FIELDBOSS gives Action Elevator the infrastructure to absorb new businesses efficiently and produce clean data under diligence scrutiny, without grinding the core business to a halt.

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THE BLUEPRINT FOR SUCCESS

Three parties. One shared outcome. Eight months.

What made this work wasn't any single decision. Not the software selection, not the governance structure, not the go-live approach. It was the deliberate combination of all three, and the discipline to keep all parties aligned through the friction that any real transformation produces.

That combination is not complicated, but it is specific. The right platform for the business, chosen for the right reasons. Independent program governance that holds every party accountable without becoming a bottleneck itself. Leadership that participates in the change rather than observing it. And a vendor that shows up after the contract is signed, not just before.

For elevator contractors evaluating their own systems: the question isn't whether your current platform is working. It's whether it's working for the business you're trying to build. At 500 units, patchwork processes feel manageable. At 2,000, they don't. The time to make the change is before the ceiling becomes a wall.

Interested in
how **FIELDBOSS**
supports PE-
backed growth
and technology
modernization?

Contact Us Today