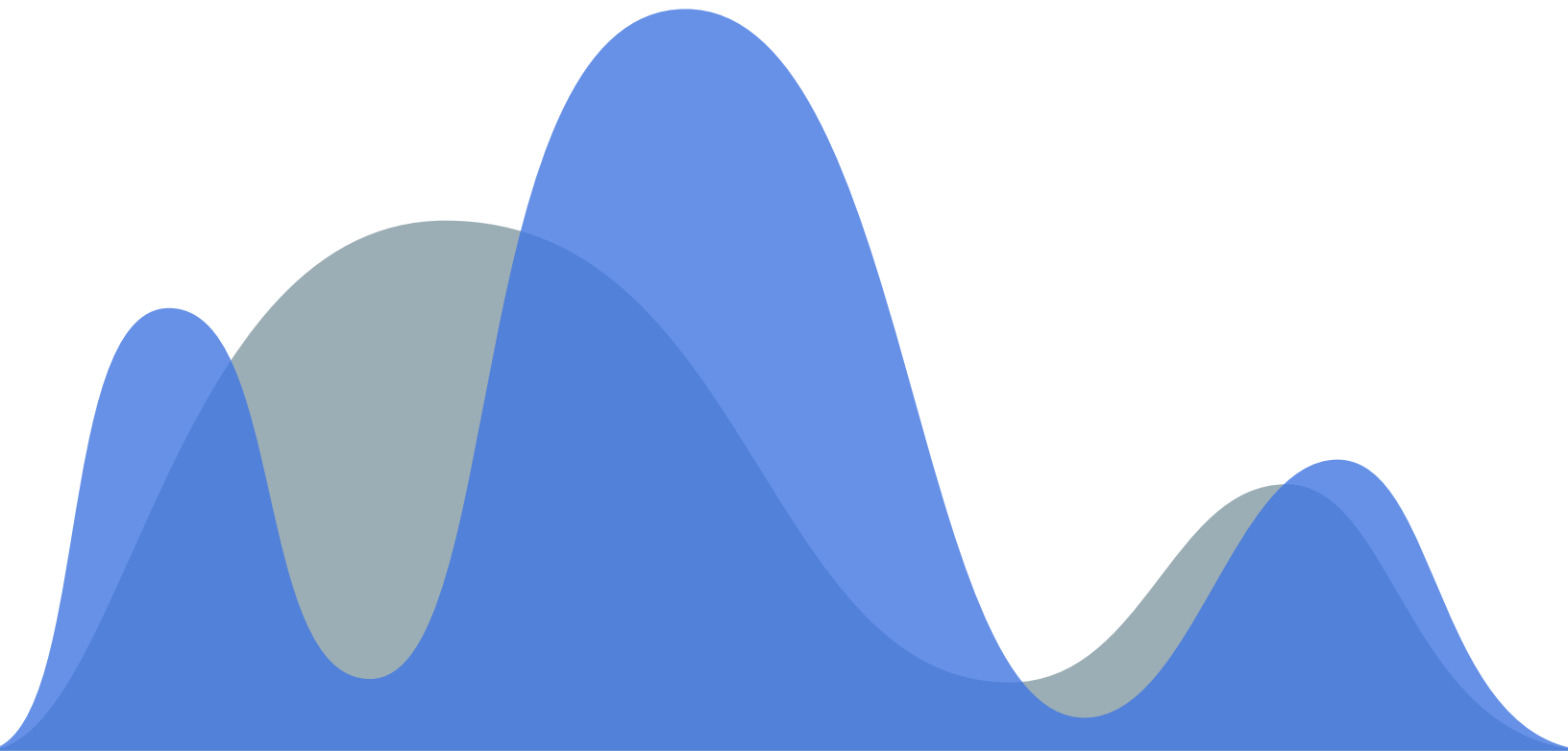


CASE STUDY

CALIFORNIA ENERGY CONSULTANT SERVICE

How a Software System Became an Operations Manual

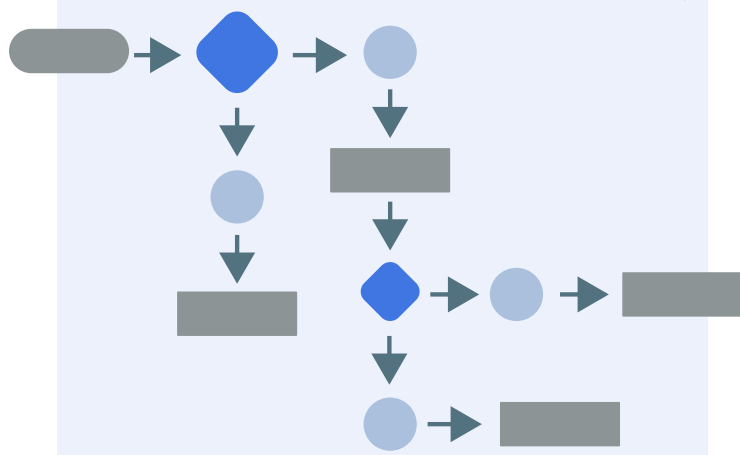




HANDLING THE COMPLEXITIES OF A GROWING HOME IMPROVEMENT BUSINESS

As their company grew and the business model became more complex, California Energy Consultant Service in Rancho Cordova, CA, found themselves mired down in day-to-day operations. "Tracking processes so things don't fall through the cracks was close to impossible. We were missing opportunities to avoid recurring mistakes since we were so overwhelmed," said Phillip Isaacs, president. As any business owner knows, complexity can constrain productivity. When that happens, you spend more time, money and energy to accomplish more tasks and activities as you continually add and manage additional personnel. "We are not able to pass these costs onto our customers thanks to the competitive nature of our business," added Isaacs.

"We were missing opportunities to avoid recurring mistakes since we were so overwhelmed"



BEST PRACTICES BUILT-IN

THE KEY TO INCREASING PRODUCTIVITY

California Energy Consultant Service sought out a business management system to help them move from tracking marketing and sales results using a cumbersome Excel spreadsheet. They chose improveit 360 because it automates ROI tracking on marketing as well as closing ratios for their sales team.

What Isaacs discovered was that the system also provided many ways to create processes that his team had to follow.

"Compartmentalizing tasks as much as possible while working together as a team is important for productivity. Before improveit 360, we were always tracking down files and found it difficult to collaborate on complex tasks," said Isaacs.

They started using the built-in templates, reminders, and reports to track all the complicated workflow processes in the business. "The system allows us to assign team members with tasks they are responsible for keeping up to date – if someone is out sick we can simply take over where the last person left off and mark and update tasks as needed," he stated. "The project views give the production manager a bird's eye view of each project so we can easily do the detective work needed to stop a recurring error."



WHEN THE SYSTEM BECOMES THE OPERATIONS MANUAL

For California Energy Consultant Service, improveit 360 became the structure the company needed to both teach and enforce best practices so they could handle the growth and complexity of their operations. "What's funny is that we were working on an operations manual literally for years. No one was motivated to get it done, especially me," said Isaacs.

"The system requires us to track and follow-up with all leads and all customers. Templates call for us to follow all the steps needed to complete a project. We've even eliminated our clunky paper file flow. There are no more file checklists, no searching for paper folders, and we no longer have to have special colored files or color sticky tabs for various customer files," he added.

improveit 360 has become their operations manual, in digital form, for every corner of their business. "We can now easily track any activity and who is contributing. And we have accountability of who is doing what they say they will. And improveit 360 became a valuable tool when helping to train new employees, holding their hands along the way, showing them what is required or what they should do next."

ABOUT CALIFORNIA ENERGY

California Energy Consultant Service has been providing outstanding products and services to the Greater Sacramento area for over 30 years and is one of the largest door and window replacement companies in their area. They cater to all customers' needs and concerns by offering superior quality windows and doors. They have a wide selection of Sacramento windows, doors and siding to provide existing residential or commercial space a new and improved look. They also install siding and have a heating and air division.

ABOUT IMPROVEIT 360

improveit 360 is the only business management platform designed to eliminate chaos, lower costs and increase profit. With improveit 360, home pros generate and close more deals by automatically nurturing leads until they buy, track all customer interactions, and manage leads, sales, and projects from one central location. With best-in-class dashboards and reports, owners get a 360 degree view of their operation for better decision-making. This powerful system is web-based with no software to install or upgrade. The mobile apps give your team remote access to vital information on a smartphone, laptop or tablet.