



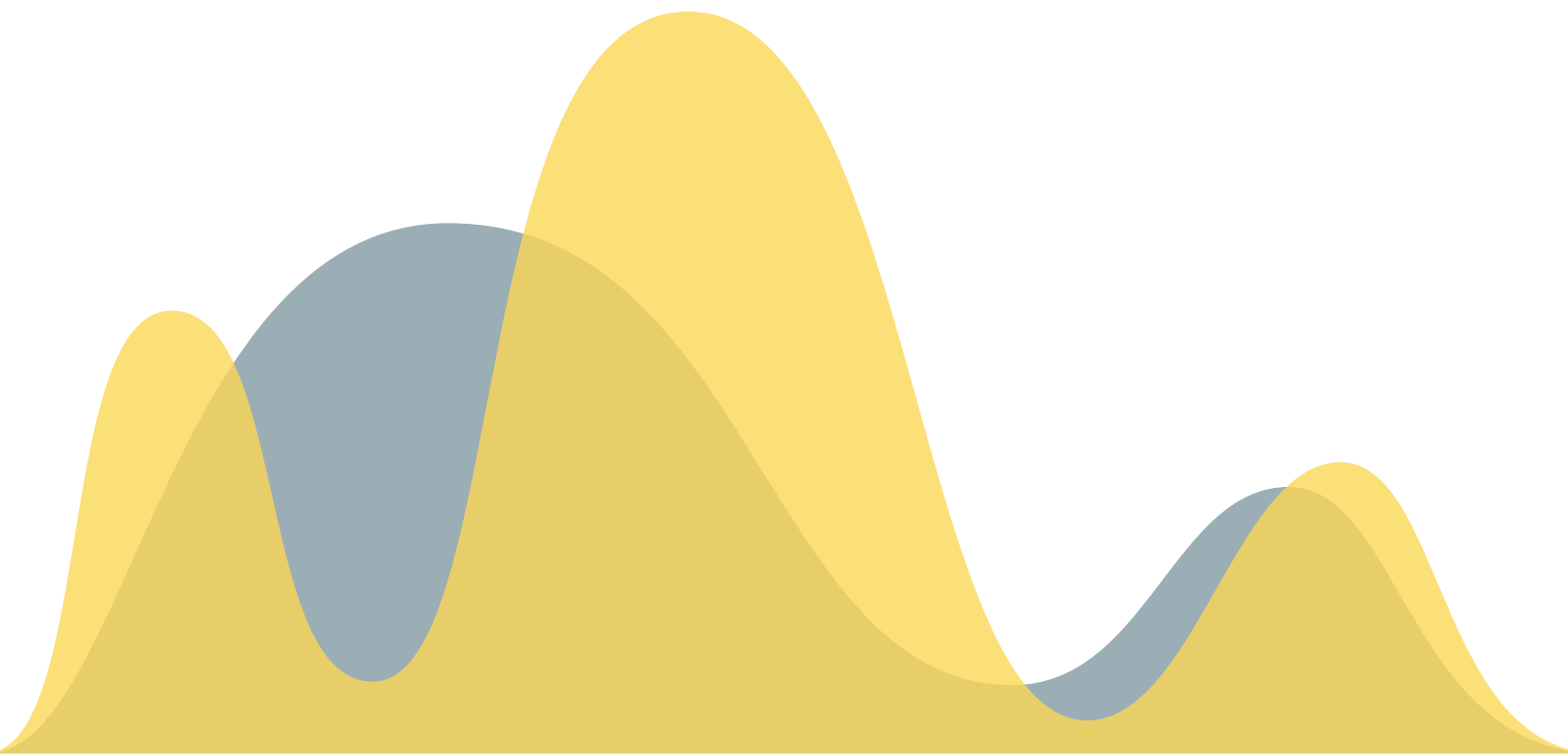
improveit 360

# CASE STUDY

## BAY HOME & WINDOW

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How a Project Template Saved a Company Time,  
Money & Effort





# EFFICIENCY ISSUES PLAGUED PRODUCTION

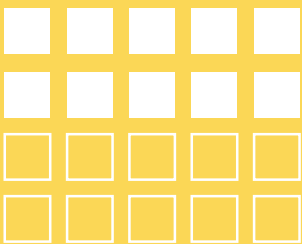
Bay Home & Window in Pleasanton, CA, needed a system so they could more easily market to previous customers and open a call center division. But they also needed help solving issues they were having on the production side. They chose improveit 360 because of the lead and sales management capabilities and discovered a surprising benefit after implementation.

Many of their projects were being held up. In the home improvement industry, time is money and they wanted to become more efficient throughout every part of the company. From the initial measurements to receiving products, many jobs were delayed by more than a week. They knew there were inefficiencies but had no way to pinpoint any bottlenecks in their process much less solve the related issues. "Our re-measure draft person tried to get everything organized in batches so the orders could be turned in together," said Vice President Gary Falcon.

"And our receiving process, in retrospect, was quite laborious. We would get a shipment in, pull packing slips, run them upstairs to a file clerk who would pull the corresponding files, and distribute the files to the correct project manager who would then begin calling the customers to schedule the install," he added.

## CUTTING TURNAROUND TIME

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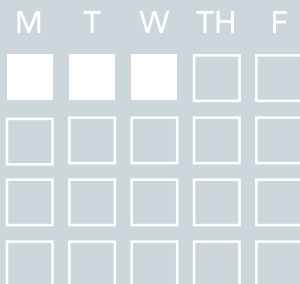


10 DAYS

ORDER, RECEIVE, SCHEDULE  
BEFORE IMPROVEIT 360

3 DAYS

ORDER, RECEIVE, SCHEDULE  
AFTER IMPROVEIT 360



## DATA IN, DATA OUT

One of the features they discovered while using the system was the improveit 360 Project Template and all of the reports associated with it. It really opened their eyes, helping them see where there were delays and serious inefficiencies.

"With a series of reports we could see where jobs were getting hung-up and identify specific areas to improve on. We found out that the draft person was sitting on jobs way too long," said Gary Falcon. They put a procedure change in place and daily reports held the drafter accountable to a 2 day turnaround, cutting the average turnaround time by 5 days.

They were quickly able to utilize the Project Templates feature to handle the pesky receiving process and saw where efficiencies could be gained. "Turns out the old way would sometimes take 3 days to accomplish."



“With the system’s new process, we now receive the shipment in our warehouse and the receiving manager marks the project activity as ‘Received Complete Job’, which means the packages are here. The project manager gets updated reports automatically several times a day, so now he can schedule installations right from the report the same day the product arrives. This cut out those 3 days we were wasting on our turnaround time from received-to-scheduled.”

## ONLY THE BEGINNING

In the end, it was multiple “small things” that added up to a larger problem, and Bay Home & Window needed the visibility to see them. Having a complete Business Management System like improveit 360 has helped take Bay Home & Window to a new level of efficiency and cost savings, which translates into dollars. “After 2 years of using improveit 360, we have become more efficient in almost every area of our business and, certainly, we have profited from those efforts. We have only begun to tap into the full potential of the system,” stated Falcon.

### ABOUT BAY HOME & WINDOW

Bay Home & Window, a division of the HomeSource Company, is based in Pleasanton, California. Founded in 1994, they have become one of the country's leading suppliers of custom interior shutters, custom built-in organization systems, and installation to home and business owners throughout the San Francisco Bay area. The company focuses exclusively on plantation shutters and ORG™ Custom built-in organization furniture, and they offer the largest selection of different materials and construction types in the country. Each staff member is an expert in the plantation shutter and home organization system field, which makes their design and installation team one of the most renowned groups in the entire industry.

### 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.