TechOps Partners

CASE STUDY

Industry
Solar Installation and Sales

HQ
Vero Beach, FL

Employees
15

Office
1

Introduction

A growing Solar Company in Vero Beach realized that their processes and systems weren't keeping up with their pace of growth. Their sales team was tracking leads on a spreadsheet, management had no visibility into the sales pipeline and operational workflows relied on paper forms, manual data entry and siloed systems. They realized that to be competitive and more profitable, they needed to digitize their workflows. They retained TechOps Partners to help implement a highly customized CRM, digitize the handoff between sales and installation, and develop a custom integration to connect the CRM with Quickbooks.

Problem

1. Sales team lacked tools to optimize close rates
2. Leads weren't assigned to a sales person in a timely manner
3. Sales Management didn't have visibility into sales pipeline, close rates or marketing performance
4. Sales Management didn't have visibility into individual sales team performance metrics
5. Handoff from Sales to field services and operations was based on paper forms and manual data entry
6. Work orders for field techs are paper based

Solution

1. Implemented and customized a CRM solution from Zoho
2. Implemented text notifications for new web or affiliate leads
3. Built automated workflow to send personalized emails and remind sales team to follow up with prospect and customers
4. Created dashboard reports for management to show key performance indicators
5. Implemented a Cloud Based Field Management solution to schedule and track customer service calls
6. Developed custom integration between CRM and Field Management solution to eliminate unnecessary data entry into Field Management solutions
7. Built custom mobile forms to replace existing paper forms

Benefits

- **Greater visibility into leads, sales and conversions**

- **Eliminated data entry by automatically inputting all leads into CRM**

- **Improved referral partner activity through improved tracking and communication**

- **Increase sales conversion double digits percentages**