



## CASE STUDY

# LEARN HOW A SOLAR COMPANY IMPROVED ITS CSAT RATES BY 50%



## Overview

A local solar company in Connecticut has been working hard to make renewable energy accessible for everyone. They don't merely make solar power affordable and easily accessible for families living in low-to-moderate-income communities, but also help them save on utility bills every month!

Initially, when they were just getting started, they found it easy to manage everything using spreadsheets and WhatsApp chat. However, as their solar panel leasing program attracted the interest of local communities, they began facing the brunt of startup growing pains. As their back-office staff and field teams started spending more and more time on administrative work, their desire to invest in a field service CRM grew stronger.

## Challenges

The solar company realized the need for a more efficient way to manage its growing business. Listed below are some pain points they faced in their day-to-day operations:

- Their overflowing excel spreadsheets were no longer able to efficiently manage their operations.
- Overscheduling and double booking became too common an occurrence in their daily operations; this caused customer dissatisfaction and churn.
- Although WhatsApp was convenient to chat and share images, there was no way to look up images according to a project or customer.
- Dispatching and scheduling were long, arduous processes riddled with inefficiencies.

Without a centralized field service management system to track and manage all the steps involved in their back-office and field operations, the solar company's growth goals were at risk.



*Using Zuper has been a game-changer for us. We were probably juggling four different software solutions before, but now it's just one, Zuper! Zuper is an easy-to-use, and powerful piece of field service management software that does exactly what you need it to.*



## Solutions

When they realized that archaic tools were not cutting it anymore, the solar company found itself in need of an end-to-end solution. They turned to Zuper's Field Service Management (FSM) solution, cloud-based software that helps easily manage field service operations from job scheduling and dispatch all the way through invoicing and reporting.

### 1. Scheduling process made hassle-free

Zuper's FSM made it easy to create custom schedules that fit their needs. With Zuper's drag-and-drop scheduling interface, dispatchers who previously took hours to assign the right field service technician for a job were able to make the right assignment in a matter of minutes. As they expanded into new areas, this feature allowed them to quickly adjust without hassle or delay in service delivery!

### 2. Image classification problems sorted easily

With Zuper's digitization capabilities, field service technicians working in the solar company were able to quickly and easily attach detailed records with high-resolution pictures (before/after) for each job. They could now keep an accurate record of all associated images of installation or service without any hassle or confusion on their end!

### 3. A better messaging alternative than WhatsApp

Technicians, supervisors, and back-office operations can have a conversation within a work order using the chat module. This feature doesn't just eliminate the need to switch back and forth between messaging platforms but also provides them with an ongoing thread they can go back to if needed, all without sacrificing professionalism or business standards!

### 4. Seamless connect with other third-party apps

Zuper's API integration helped the solar company connect with all of their productivity tools like HubSpot CRM, Salesforce ERP, and QuickBooks seamlessly. These integrations were capable of synchronizing data both ways ensuring a single source of truth. Zuper's marketplace has around 50+ ready-to-use, built-in connectors for commonly used third-party tools.

### 5. A visual representation of KPIs

Zuper's FSM dashboard enables solar company managers to quickly identify and troubleshoot any issues that may arise. It provides a bird's eye view of all field service operations, from job status and dispatch, right down to the productivity levels of each individual employee and their utilization levels!

## Results

Implementing a field service management system has had an incredible impact on the growth and success of the solar company. The Zuper FSM allowed them to:



Improve customer satisfaction rates by 50%.



Cut down the time spent on administrative tasks by 75%.



Accurately document, label, and store installation or service images.



Smoothly expand their team without adding unnecessary overheads.

Interested in scaling up your field service operations?

Contact us today for a free **demo!**