Squaretree

CASE STUDY

Can You Support the Needs
OF YOUR GROWING BUSINESS?

ConSol, one of the nation's largest independent residential energy consulting firms, had grown rapidly in a short amount of time. Because of this, their homegrown database could no longer support their needs.
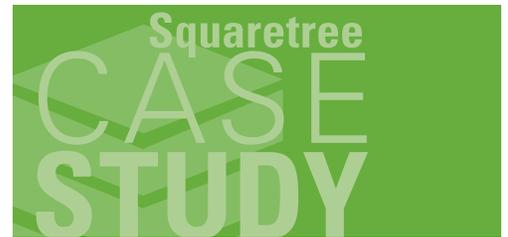
Their organization's workflow was difficult and time-consuming, and employees were often receiving inaccurate and inconsistent information. Additionally, their current applications were creating fragmentation throughout the company because employees could only access their portion of projects instead of an overall view.

ConSol decided to acquire professional application development services to provide a new workflow and organizational structure. After considering the quotes and proposals of several vendors, ConSol chose Squaretree IT Projects because of their thoughtful and strategic approach to the solutions, their competitive pricing, and because they were forthright in providing information.

Squaretree created a customized application labeled **COLTS (ConSol Online Tracking System)** to produce a highly collaborative and connected work environment. COLTS tracks everything in the workflow, including projects and invoicing. ConSol's customers can now view the status of their projects on ConSol's website and can receive timely project updates via e-mail. David Meyers, ConSol's Professional Services Pre-Production Manager, praised Squaretree's critical thinking skills, *"Squaretree continuously questioned the logic of workflow in the creation of the database and application. They helped us to understand our business a lot better. As a result, the application came out better than we could have imagined."*

However, the biggest change was in the sales force. With the addition of the application created by Squaretree and the SharePoint Portal™, ConSol's sales force can now proactively view every facet of their projects, giving them the ability to take action and communicate more effectively with customers. After participating on sales calls with ConSol's team, David was excited about the application's effect on their sales presentations. Sales could now confidently show how ConSol could help builders easily track their projects, providing incredible value. *"This is exactly why we decided to use this solution,"* he stated. Furthermore, David attributes Squaretree's solutions with helping ConSol to achieve its most profitable quarter and month in the company's history. He asserts, *"Squaretree's service is top-notch and their solutions have greatly surpassed my expectations."*

Do you often hear questions such as: *Who has the current project report? Is Joe done? Didn't we just look that up yesterday? or Have we billed on that work?* **Many companies do and if your system isn't easily supplying the answers then each question takes time from two or more people, time that could be far better spent completing the project instead of gathering information. This is typical when the right people aren't getting the right information at the right time. This is where professional custom application development can shine.**

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THE BENEFITS

- **Customized Software:** Now ConSol has a comprehensive solution for managing their business practices. The software built by Squaretreee integrates with their other applications, including *Great Plains* (for accounting) and *SharePoint* (for collaboration), creating a strong connectivity throughout the organization.

- **SQL Reporting Services:** In the past, it took weeks for ConSol to create reports, now they are able to produce them with the click of a button.

- **Discovery Process:** Squaretree met with ConSol several times in order to understand their business processes and to brainstorm a complete solution that would meet their needs. This helped ConSol to gain perspective on their business goals and enabled the project to be *on time, in budget, and beyond expectations.*

- **SharePoint Portals:** With the help of SharePoint, ConSol can create multiple lists and views on their workflow information from COLTS, increasing collaboration throughout the company. Also, customized SharePoint features such as graphs, are designed to meet ConSol's specific needs.

- **More Affordability:** Even though ConSol has their own IT department, they choose to outsource their applications because it is very cost effective.

THE RESULTS

ConSol is very pleased with their new applications, and they have also been able to increase their profitability.

Now ConSol's employees can quickly identify work that needs to be completed, managers can review the overall picture, and sales can identify which departments are being under or over utilized. ConSol is now a larger company, but they can still work collaboratively and productively—with the help of COLTS.

Squaretree
Software
On Time, In Budget, Beyond Expectations