

# From Paper to Productivity: HVAC Company Transforms into a Paperless Office

## PROBLEM

A1-Guaranteed, a trusted heating and air conditioning service business in California, recognized the need to transition from their conventional pen, paper, and QuickBooks office setup to a streamlined paperless solution. Realizing that their existing operations were constraining their expansion, the company explored various Field Service Management products.

## WHY RESULTS?

Despite the abundance of dispatching and scheduling solutions on the market, none of the options A-1 Guaranteed considered provided a comprehensive Project Management tool. What set Results apart from the competition was its exceptional capacity to handle projects, dispatch technicians, and manage tasks. A-1 Guaranteed recognized that Results could help them efficiently handle permits, aid clients in qualifying for rebates, and offer vital field support to their technicians.

## SOLUTION

A1-Guaranteed has seamlessly integrated Results into all aspects of its operations. This powerful tool is employed for various purposes, encompassing daily scheduling, project management, tracking, service administration, and invoicing. Thanks to this implementation, the company can efficiently oversee all of the details that were too cumbersome to track with their previous paper files. Employees can access comprehensive reports covering sales, post-installation testing, invoicing, permit records, and more, ensuring a streamlined and data-driven approach to their business processes.

## AT A GLANCE

### Results Solution

Field Service Management

### Industry

Heating & Air Conditioning

### Number of Users

31

### Integrated Apps:

- Outlook
- QuickBooks

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“Once we reached a certain threshold, handling an office filled with paper files became overwhelming. Results enabled us to transition into a "paperless" company, compelling us to refine our processes. The fear of misplacing or losing files is now a thing of the past, as everyone within the company can easily access the real-time status of any project or service order”



**PHILIP SANDERS**

## BENEFITS

### Project Visibility

Results demystified the inner workings of company operations. By granting complete transparency to every project and customer, the entire team can enhance communication and deliver outstanding service to their clients. By providing everyone with access to project information, employees can offer customers up-to-date details on rebate status and provide an explanation for any delays, ensuring a seamless and informative experience.

### Process Automation

A-1 Guaranteed streamlined their operations using event-triggered automation. As a result, the company can effectively oversee their business at a strategic level, without becoming entangled in the minutiae of management. Results allowed A-1 Guaranteed to expedite several of their multi-step processes, ensuring all members operated from the most up-to-date information. When employees are out of the office, others can seamlessly pick up where they left off. Results has played a crucial role in optimizing operations as the team's capacities grew, ensuring the completion of projects, scheduling, process documentation, and the elimination of unnecessary inefficiencies.

### Competitive Advantage

Results has enabled A-1 Guaranteed company to both efficiently manage installations and client service while effortlessly tracking all rebate and testing information. This has given the company a competitive advantage over their competition by ensuring that customers receive the maximum value.



## MOST VALUABLE RESULTS FEATURE

### PROJECT MANAGEMENT

A-1 Guaranteed relies on the robust project management features in Results to manage large-scale projects involving multiple steps, as well as the often-neglected small tasks.