

Transformative Growth: How Results Revolutionized Operations and Attributed to Double Revenue

PROBLEM

Roll-A-Shade, a leader in commercial window treatment manufacturing and installation services, had ambitious plans for substantial growth. Despite having effective operational processes, the company recognized the limitations of the existing Microsoft Excel and paper-based operations. Understanding that company expansion necessitated a shift from their traditional methods, they started to search for an operational software solution to centralize data and provide enhanced customer reports and managerial visibility into their operations.

WHY RESULTS?

During the initial product demonstration, Roll-A-Shade found the proposed vision for managing and overseeing their operations with Results highly impressive. The deciding factor in choosing Results was its seamless integration with QuickBooks, including the ability to create purchase orders in Results and later transfer them to QuickBooks. The ability to convert quotes into invoices was also an appealing Results feature that would allow Roll-a-Shade to eliminate double data entry. Roll-a-Shade was impressed by the format in which Results provided centralized access to all records and that users could quickly sort or search on any field.

SOLUTION

Roll-A-Shade is confident that the efficient and detailed processes they created within Results have played a pivotal role in securing additional business gains. The company successfully achieved its expansion goal and doubled its revenue since implementing Results. Results empowers the Roll-A-Shade staff manage thousands of simultaneous projects effectively, ensuring they stay on track and adhere to project timelines.

AT A GLANCE

Results Solution

Field Service Management

Industry

Manufacturing & Installation Services

Number of Users

56

Integrated Apps:

- QuickBooks
- Avalara AvaTax

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We capture more business because we have great processes set up in a great operations platform that keeps us on track and on schedule. If we didn't use Results for our internal business operation, we would not be nearly as organized, efficient, or productive. We have grown over 50% in the last two years, but our headcount has only increased by 8%, and we attribute that success to this application.



STEVE WILLIAMS

BENEFITS

Customer Experience

Roll-A-Shade was impressed with the Results onboarding and training process. As extensive as the Results features are, the users were relieved with the short and seamless learning curve to implement their work in Results. Roll-A-Shade states that the Results Client Services team is accommodating and efficient, consistently delivering solutions to questions and issues in an impressively timely manner.

AvaTax Integration

The sales tax calculation plays a crucial role in determining Roll-A-Shade's ability to deliver accurate quotes, orders, and invoices. Presently, the company conducts operations in 20 states and is required to file quarterly sales tax reports in 46 states. With multiple warehouses across the country and multiple bill-to and ship-to locations, creating sales tax calculations is more than complex. Integrating Results with AvaTax is instrumental in simplifying this process, enabling any team member to generate precise quotes and invoice calculations effortlessly and without the need for accountant oversight.

Project Management and Reporting

Roll-A-Shade uses Results to manage over 2,500 projects, with significant deadlines and milestones. Results helps guarantee that all projects stay on track. Staff can easily view, sort, arrange, and search for pertinent data and adjust priorities based on the various deadlines and milestones. Roll-A-Shade uses the reports generated from Results to provide elevated responsiveness to their mega-franchise clients with high growth demands, high expectations, and a complex network of implementation contractors.



MOST VALUABLE RESULTS FEATURE

QUICKBOOKS INTEGRATION

The integration with QuickBooks enables the effective management of their intricate channel, construction, and manufacturing endeavors. Users can configure quotes and seamlessly convert them into invoices that sync with QuickBooks Desktop, thus eliminating double data entry.