

A FIGTREE SUCCESS STORY

ONE CALL HOME REPAIR

WORKFLOW MANAGEMENT SPELLS SUCCESS FOR AMBITIOUS HOME REPAIR COMPANY

“I love this system, the Pipeline is our bible...”
- Terri Esposito, Office Operations Manager of One Call Home Repair

Its name says it all. One Call for your home repair needs. And before One Call Home Repair opened their doors they wanted to be sure that their new company could keep their promise of a reliable source for quality home repairs on budget and on schedule.

Making this business model work required software that enables operations to keep schedules on track and management to keep up with the business requirements. One Call needed a software tool that would allow management to constantly review and fine tune estimates and schedules. They brought the description of their business model to Figtree Consulting, Inc.

Solution Design

Figtree analyzed the work flow and developed a design document that laid out the screens and flow of a custom software system. The centerpiece of this system is the Pipeline, a tool that enables management to quickly take the pulse of the company and operations to keep orders moving through the system efficiently.

By looking at one screen, you can see the number and potential dollar value of jobs in each stage as well as the name and other critical information about each of these jobs. Some of the stages shown in the Pipeline include:

- Estimate to be scheduled
- Estimate completed, but not yet quoted
- Estimate recently sent, awaiting customer OK
- Estimates to be followed up
- Accepted jobs awaiting scheduling
- Jobs pending completion
- Jobs awaiting entry of actual time and materials
- Jobs pending receipt of payment

You can drill-down to the detail behind the statistics with a click of the mouse, and move the project along appropriately from estimate to work-in-progress to receipt of payment.

Design Methodology

Figtree design methodology has been honed on business projects for over 20 years. This process includes standards for design, prototyping, coding and testing that ensure a quality product.

Figtree works closely with clients to define the project. What will the business purpose be? How will success be measured? What related processes will be effected and how? Who will use the new system? How do they perform these tasks now? What will be the scope and size of this project? What are the implementation issues? These and many other questions need answers in order to develop the system.

Figtree then works with the client to develop ‘use cases’. These are descriptions of the situations that might come up in use of the software and how they are to be handled.

During this design phase, the blueprints for the application are developed and the foundation is laid.

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Prototype

Next, Figtree develops a prototype. Screens and reports are laid out and the system flow defined. This is presented and reviewed. It is essential that the design team and the client both clearly understand how the software is to operate.

Code

Once the requirements and flow have been determined and the prototype has been reviewed and accepted, the software is coded. Coding and testing are closely intertwined. As each section of code is completed, it is tested to see that it functions as required.

Test

Figtree tests on many levels. Does the software provide the business functionality that is required? Does it work without crashing? Is it easy to use? Will it be easy to learn? Is it pleasant to use? The Quality Control group works with programming to thoroughly test the product. The previously developed 'use cases' become the basis for much of this testing.

Implementation Approach

The Order Manager software was developed quickly to coincide with the startup date for the new company. Because of the careful design study, the system was up and ready to go on schedule.

On-line Help System

The design document including proposed screen and system flow helped everyone involved visualize the proposed system and became the blueprint for development. The document also became the basis for a complete interactive on-line Help system.

Challenge

The challenge was building software that helped control and manage the company. The command center, the Pipeline, not only gives management immediate statistics on the current status of the business but also give operations a quick and easy way to keep project information up-to-date from one central location.

The Pipeline provides basic status information at a glance. This includes the number and dollar value of all projects by status: Awaiting Estimates, Waiting for Response from the Customer, Require Follow-up, Ready to be Scheduled, Scheduled, Complete and Awaiting Payment. Selecting any of these statuses allows you to review all work orders in this status and to drill down to view or update the detail of individual work orders.

A calendar makes it possible for One Call to schedule multiple technicians and track and drill down to review or update scheduled projects and estimates.

There are reports on cash receipts as well as flexible reporting to analyze profitability by project type, technician and more.

Results

Thanks to a well planned marketing effort, One Call started with a bang. Thanks to high quality work and software that enables One Call to manage their workflow, One Call is building a successful and profitable business.

