

## CUSTOMER EXPERIENCE

# Eagle Point Solutions

## EAGLE POINT SOLUTIONS

### ABOUT EAGLE POINT SOLUTIONS

Eagle Point Solutions provides floor installations for residential and commercial markets, working diligently to be the partner-of-choice to builders and remodelers across Texas.

Knighting their service as a “solutions” company, Eagle Point lives up to their title by ensuring no matter the problem, their team will deliver the best outcome possible for their clients.

### LOCATION

Texas, U.S.A. (Houston, Austin, Dallas, San Antonio)

### INDUSTRY

Construction & Contracting

### SERVICES

Flooring

### EMPLOYEES

49

### FIELD STAFF

25



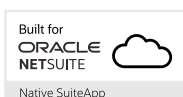
With a customer first mentality, Eagle Point promises to deliver a world class experience that offers:

- Quality flooring
- Affordable pricing
- Whatever it takes to get the job done properly
- Project completion within the customer’s timeline

Eagle Point chose NextService field management software for NetSuite as the best technology platform to meet the needs of field service operations in Houston, Austin, Dallas, and San Antonio.

**“Technicians are measured on how efficient they are at completing their jobs. By looking at the average days it takes to reach completion, we can now accurately measure that as part of their score card points. If a technician does not mark the job as finished, they’re hurting their own score.”**

Dan Guerrieri, Director of Operations



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## Business Challenges

Eagle Point's use of QuickBooks to manage inventory, reporting, scheduling and project costing presented several challenges.

Tracking inventory through QuickBooks proved to be very difficult, particularly given the need to create projections around inventory demand.

Generating costing for projects was equally difficult, given the complexity of tying expenses and revenue to a project within QuickBooks.

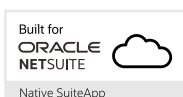
With no scheduling capability within QuickBooks, the company was attempting to use an Outlook calendar and an Excel spreadsheet to manage all of their jobs and technicians. This was especially challenging, given Eagle Point's need to schedule technicians across multiple cities.

### Other challenges included:

- Lack of visibility over inventory, both in the warehouse and in the field
- Inconsistencies with inventory counts, every single month
- Wasted time resulting from the need to chase missing parts and reconcile errors
- Large amounts of stock lost on job sites
- Poor internal communication around jobs
- Working blind when trying to track progress and updates on jobs
- Difficulty scheduling around delays and postponements
- Lack of a shared schedule to which everyone could refer
- Inefficiencies due to lack of automation

**“We bought a unified system with NextService and used it straight away to start driving efficiencies. We use the data to look at the KPI's to improve, and to drive productivity amongst our field service technicians through monitoring those KPI's. The software has more than paid for itself.”**

Dan Guerrieri, Director of Operations



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## Why Eagle Point Solutions Chose NextService

Eagle Point chose NextService as their software provider for three main reasons:

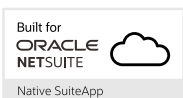
1. A drag and drop scheduling interface with real-time resource display.
2. The ability to track inventory in the field.
3. The opportunity to establish a single point of truth for all business information.

They considered several other platforms before settling on NextService, including Microsoft Dynamics.

Eagle Point's unique inventory requirements included the need to consolidate multiple third-party warehouses located in different cities. Only NextService could deliver a powerful solution to Eagle Point's inventory challenge.

**“The ability for us to establish and monitor KPIs within NextService has been huge. The more we take advantage of NextService reporting and analytics tools, the better our decision making becomes.”**

Dan Guerrieri, Director of Operations



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## Business Impact of Implementing NextService

Since implementing NextService in October 2019, Eagle Point has experienced major positive impacts on performance across their business.

### Better Inventory Management

With NextService, Eagle Point has the ability to quickly run a report that helps monitor materials on a jobsite.

Thanks to NextService, Eagle Point has increased inventory location visibility from 0% to 90%.

Inventory reconciliation, which previously took 30 to 40 hours every month, can now be completed in just 8 to 10 hours. That is a 75% reduction in time spent.

### Easier Scheduling

With NextService Scheduler, Eagle Point can view all installers across the whole company or limit the view to installers in one market.

Schedulers can easily see which installers are already booked and which are available. This makes it easy to determine next availability and confirm accurate booking timeframes with the customer.

In addition, managers gain full visibility into the day's schedule from one location.

### Higher Efficiency

Eagle Point's sales performance for June 2020 through August 2020, compared year-over-year, increased by 30%.

### Improved Accuracy

Since implementing NextService, Eagle Point's call-back error rate has decreased across all regions.

For their Austin, Texas market, they went from a 7-8% call back percentage to less than 5%, with Houston seeing similar results. In Dallas, they've decreased call backs by approximately 5%.

### Increased Technician Performance

With the power of NextService in hand, Eagle Point created an in-house report card system that measures technician performance. Managers can review each installer's progress. Installers can view and assess their own performance in comparison to their peers, based on indisputable data, adding motivation to their desire to improve the quality and efficiency of their own performance.

### Clearer Accountability

If technicians do not record accurate and timely data on each job, it reflects in their performance data. This has eliminated the need to follow up individually with technicians, because they are motivated to enter data promptly.

It is now easier for Eagle Point to identify and manage incomplete jobs.

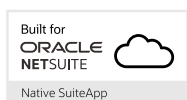
Thanks to efficiencies enabled by NextService, Eagle Point was able to manage the increase in workload without adding additional staff.



**75% reduction in time taken for inventory reconciliations**



**Increase in inventory tracking from 0% to 90%**



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**“By using the NextService Scheduler and mobile app, everyone can see what they are supposed to do. Our installers are our partners in a way, and this has helped them trust that the system’s Scheduler is accurate. It’s helped to improve communication between us.”**

Dan Guerrieri, Director of Operations

**Better Communication**

The NextService and NetSuite unified platform has significantly improved communications amongst the Eagle Point team.

Prior to NextService, installers might miss an email about a job assignment, but that is no longer a problem. Now, everything is on the NextService app, and installers have easy visibility into their full schedule.

When a technician opens the app to start work in the morning, they know exactly where they are supposed to be and at exactly what time.



**Faster Invoicing and Job Completion**

The ability to monitor jobs from completion to invoicing has been a huge improvement for Eagle Point, which now has full visibility into past due invoices.

Before NextService, installers were required to call or email the office directly to confirm that a job was completed, and that they were ready to move onto the next job.

NextService now generates a daily task report which indicates whether a job is past due, incomplete, or complete, giving management the ability to follow up on incomplete jobs in a timely manner.

This enables quicker billing for easier cashflow management.

**Reduced Paperwork**

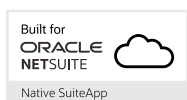
NextService has significantly reduced Eagle Point’s need to create, process, and print paperwork, significantly streamlining previously long and complicated data capture activities.

By choosing NextService to replace QuickBooks, Eagle Point eliminated the need for Excel spreadsheets and the sharing of files and pictures via email. With NextService, all data is available for immediate access within the system.

Mobile access to a continually updated schedule board and purchase order automation saves each technician at least 2 minutes per job, and when multiplied across the 3,500 jobs completed within the last 12 months - that’s a savings of more than 100 hours per year, based on just two of the many benefits NextService offers.



**30% increase in sales  
with the same team**



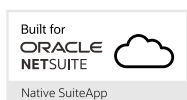
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## Specific Gains / Key Business Outcomes

NextService has resolved many of the challenges Eagle Point executives were facing in their field services business.

Challenge	Outcome with NextService
Zero visibility over inventory in the field	Able to run a report and see what materials should be on a job site. Now at 90% visibility on inventory.
Huge investment of time doing inventory counts (30 to 40 hours)	Now takes around 8 to 10 hours to complete inventory reconciliations.
Managing jobs and technicians on an Outlook calendar and Excel spreadsheet	Full visibility over technician location and availability in one place. Each manager can see at a glance what they have on for the day.
No feedback once a job invite was sent	It's easy to see each technician's job progress and availability.
Hard to share updates and delays with everyone	The Scheduler can be updated with drag and drop technology, and technicians and managers can immediately see the changes.
Multiple markets across cities causing communication issues	Jobs and technicians can be viewed by geographic location, making it easy to manage and grow in multiple markets.
Technicians were not marking jobs as complete in a timely fashion	Technicians are now motivated to enter timely and accurate data to keep their performance metrics high.
Incomplete jobs were being overlooked	Incomplete jobs are clearly visible, making it easy to ensure that they are followed up and fully resolved.
Poor communication around jobs between installers and manager	The visual scheduling in NextService makes it easy to see what work has been assigned and to whom.



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Challenge	Outcome with NextService
Confirming completion of jobs could take up to 3 weeks, slowing down the rate of invoicing	Eagle Point managers receive a daily report on overdue tasks, which helps them focus on following up and closing jobs, which leads to faster invoicing.
Lots of paperwork and emailing internally for files, job information and photographs	All information and files are added directly into NextService via the mobile app and are available instantly to the entire team.



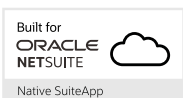
**33% reduction**  
in job call backs /  
errors with jobs



**100 hours saved**  
per year on adding  
pictures

**“There are definitely significant savings in time and efficiencies, now that our field service technicians are filling out forms on the mobile app instead of by hand.”**

Dan Guerrieri, Director of Operations



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