Large construction business needs immediate access to data and documents, the company is better positioned to make informed decisions and be proactive

The Background: Prior to implementing advanced solutions, Easley relied on spreadsheets and manual processes to operate his business.

James Easley, President of Truly Noble Services, had a clear vision of how he wanted to operate the company—and it did not include spreadsheets. “I always knew that we needed to make better use of the technology available in order to manage projects and our salesforce properly. Without immediate access to data and documents, I knew we weren’t as profitable or efficient as we could be.”

After a few years of testing proprietary and off-the-shelf software, Easley discovered Results CRM Business Suite (Results CRM). Seamless integration with QuickBooks®, the company’s core accounting solution, was an initial big selling point; however, Easley quickly discovered other valuable aspects.

“Results CRM provides the powerful business management tools we needed to link all departments together and make data immediately accessible. The development team even made custom modifications to the software to meet our needs.”

A few months later, Easley identified SmartVault, an online document storage and file sharing service. “I found out about SmartVault by using Results CRM. The integration between applications is fantastic, so we adopted SmartVault as our online document management system. It [SmartVault] makes managing and sharing documents very easy. With 24/7 online access, we can view any document whether in the office or at a job site—a significant benefit for our large base of contractors in the field.”

Integration with SmartVault allows Truly Noble employees to easily scan, upload, and attach documents to any Results CRM record and then view documents from either Results CRM or QuickBooks—the company’s accounting system. It’s efficiency at its highest. With the ability to bridge multiple departments using Results CRM and offering company-wide, 24/7 access to documents via SmartVault, Truly Noble experienced significant improvements in business operations and customer service, as well as elevated profits.

“Because everyone has access to up-to-the-minute data and documents, we are better positioned to make informed decisions and be proactive,” Easley stated.

Real time access means real time decisions

Managing thousands of projects and hundreds of contractors per month doesn’t hinder Truly Noble management from making quick, sound decisions.
Truly Noble manages approximately 1,000 projects per month and uses more than 300 contractors. And according to Easley, the company will double these numbers within the next year.

“We have a lot going on all of the time, so we rely on current data to make the informed decisions on projects. In years past, job costing was done after-the-fact. Typically, it took about a month after a job was completed to get final numbers. With Results CRM, we can view costs on a day-to-day basis and make adjustments on the fly to keep jobs within budget.”

Truly Noble's six-person salesforce also relies on Results CRM to manage new business through the sales funnel. “Our sales people log all communication with prospective clients. I can see all interactions and easily follow progress on each case. This offers valuable insight on which prospects are a better fit for our business.”

Customer service has also improved since Easley fulfilled his vision of adopting advanced technology to improve operations. “We can locate any document in SmartVault quickly and send it to a customer immediately and securely. This level of efficiency improves our ability to serve our customers and ultimately makes them very happy.”

Overall, Easley reported that customer service has been significantly elevated since streamlining internal processes. “Today, it's all about technology when it comes to serving clients. Without this advanced solution in place, we would not have the ability to be as proactive as we are in identifying and avoiding project issues.”

And it just keep getting better

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“Both vendors are constantly adding new and helpful features,” stated Easley. “I also like that they are willing to listen to me and work with me to make tweaks to the system.”

Easley's vision has become reality: To implement powerful technology to better manage operations and improve profitability, internal efficiencies, and customer satisfaction. The combination of SmartVault and Results CRM has changed the way the company does business.

“We went from a process where we had to rely on data coming in after-the-fact and no way to support business-wide data visibility to a fully integrated system that allows all users from all branches of the business to access and view current, accurate information and make sound, proactive decisions,” Easley said. “That's the only way to do business!”

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