



Closet Tailors Creates a Custom Fit Through Streamlined Service and Increased Efficiency with ServiceTycoon



The Company

Closet Tailors, based in Reston, Virginia, specializes in the design and installation of custom organization solutions for homes and commercial offices, and is part of a national franchise under parent company Home Franchise Concepts. Serving clients throughout northern Virginia, with several in southern Maryland and Washington, DC, Closet Tailors create storage systems for closets, garages, home offices, pantries, laundry rooms, and even Murphy beds. For commercial companies, they can design office and retail space, mail and supply rooms, and break areas. Closet Tailors takes a consultative approach to their clients' storage needs, looking to construct perfect spaces to keep things secure, organized, and in-line with clients' lifestyles or business needs.

The Challenge

Closet Tailors drives to deliver a high level of customer service, with shop-at-home convenience, free consultation to evaluate client needs, and professional design and installation for a proper fit every time to save time and money. They do all that with a "just-in-time" business model, developing 3-D designs for client review, ordering components as needed per job, and scheduling a mix of full- and part-time technicians for installations. From his previous experience running a small computer software company, Closet Tailors franchise owner and manager Todd Carter knew the importance of having a robust service data infrastructure in place to not only run his business, but to position himself for growth as well.

"It was important to get the system in place early on," said Todd. "We have several installation crews and several designers on the team, serving about 200 clients a year and that number is growing. We're answering queries, scheduling appointments, and going on calls. It's important to have an easy to use system to capture and track our customer data and have it accessible for team members in one place." He looked at other data tracking systems, but found their approach too general (trying to be everything to everybody), too expensive, or time and labor intensive to adapt to what he needed the system to do.

Benefits

- **Robust, flexible data infrastructure** readily adapts to our business needs
- Operational efficiency **went up 20 to 30%, saving us 15 hours of time each week**
- **Capture and track all client information** in one location
- **Secure internet access** provides data input, storage, and download from any web browser
- **Powerful, intuitive user interface** gives us ease of use throughout the company

The Solution

A colleague recommended looking at ServiceTycoon from ClickSoftware, the leading provider of workforce management and service optimization solutions. "ServiceTycoon is tailored to the service business," relates Todd. "Expertise in both the service industry and home service are embedded in the company and the software." Designed for the dynamic service environment of small and medium size businesses, and with tools that are critical to companies of all sizes, the comprehensive capability of ServiceTycoon lets Closet Tailors cleanly capture the information around a client's project and store it for access throughout the job process for easy reference, from scheduling appointments to assembling designs, through installations, service calls, client follow-up, and email marketing.

Because ServiceTycoon is a native internet application, it's easy to integrate partners, designers, or sales people, who don't need to be in an office to enjoy all the capabilities they need to do their work over the web. A powerful, intuitive user interface lets team members quickly enter data or pull up information to develop projects or satisfy client needs. And the system is designed to scale rapidly to the needs of the business, letting managers quickly add as many users as they want with specific access to the data they need.



Configurability is a key issue with any software system: how easily can a standard system be adapted to a company's work process? "With ServiceTycoon, the elements are there, and it's very, very easy to configure it to your needs," said Todd. "It's really flexible for things like defining the stages of a job you're working on, internal tracking, the different products you offer. For us, color and finishes are important elements. We can easily create new fields and tags for the system. It's easy to open new user accounts, and then that person can manage all their client files very easily and keep track of the opportunities they're working on."

The Implementation

At the first contact with Closet Tailors, a new client is entered into ServiceTycoon. Queries entered at the main Closet Tailors website are automatically linked to the system and set up as business opportunities. After telephone follow-up, a client appointment is made and the system sends an email confirmation in less than one minute using pre-formatted templates that include a summary of the job request, the appointment time, and needed information.

All information about the client's project is subsequently added to the system: client consultations, proposals, 3D designs, job plans, and invoicing. A Job Packet generated by the system goes with the installation team. The packet includes the plans for the project and a pre-printed invoice that's given to the client when the installation is complete. The result is a professional operation throughout with the look and feel of a big company organization. Secure Socket Layer (SSL) technology ensures that data is safe, secure, and available only to designated users. A network engineered for zero downtime and complete daily backup keeps information available for whenever it's needed.

"We run our company with the system," says Todd. "We can access data from anywhere over the internet and can update information from anywhere as needed. I'm a Blackberry user, and I can download appointments from the system, and take all the information with me. The data is always available, plus it's backed up and secure. I sleep well knowing I don't have to worry about my data. And in terms of support, we have not been disappointed. The support team is prompt, and we get everything we need."

The Results

ServiceTycoon gives Closet Tailors the high efficiency service management infrastructure it needs to function smoothly. It eliminates duplicate data entry while populating the system with essential information for client appointments, design proposals, material ordering, scheduling, project installation, invoicing, and financial tracking. The link to QuickBooks makes integration of financial information seamless. "Not only does it save on data entry, but our office manager even uses it as a double check to make sure everything is covered," reports Todd.

Closet Tailors estimates improved efficiencies of roughly 20 to 30% to their operations, or about 10 to 15 hours per week, in time saved by eliminating duplicate data entry alone. Invoices delivered at time of installation results in shortened payment cycles, with installers returning with signed invoices and

payments. They also find they can respond more quickly to new client queries, and can mine their database of client contacts to promote new services and develop new opportunities.

"You would be hard-pressed to find an easier to use, more effective system for a small growing business," concludes Todd Carter. "ServiceTycoon delivers a strategic advantage. Our business is up over 20% year-to-year and I attribute a good part of that to the efficiencies we have from ServiceTycoon. We're not spending extra time to manage our data. Because of the system, we're prepared for growth. Our infrastructure is in place for this."



"We needed the infrastructure of ServiceTycoon to support our growth effectively. We literally run our company on it."
Todd Carter, Franchise Owner & Manager, Closet Tailors

- For more information on Closet Tailors visit www.closettailors.com
- For more information on Service Tycoon visit www.servicetycoon.com

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