Mobile App Helps Improve Sales Productivity for a Renewable Energy Solutions Provider

About the Client

Our client is a leading provider of renewable energy solutions offering solar electric systems for residential and commercial customers. Their mission is to facilitate the use of clean, free and renewable solar energy in an efficient and affordable manner for homes and businesses. Established in the year 2009, they offer a broad range of solutions from solar panels, ground-mounted and roof-mounted installations to grid-tied systems.

Business Challenge

- Like most property improvement projects the installation of solar power equipments was done in different phases. However, the Jobnimbus CRM used by the client allowed them to manage their projects only at the task level.

- They required a long term technology partner to help build a system that can track the progress of work from the initial step of installation till the completion.

- The application should have the ability to integrate & share information with the CRM tool and maintain a certain level of transparency between the various stakeholders in the organization.

InApp

InApp's Solution

InApp designed and developed an Android application as a wrap-around solution to the Jobnimbus CRM. The mobile app facilitates their sales team to record the information right from the assessment stage, throughout the entire project phases. The team's daily tasks will be allocated through the CRM and its integration with the mobile app allows the team to view the details in their respective mobile devices.

During product installation at the customer site, the team records their working progress with the help of form templates available in the mobile app and has an optional feature to attach pictures. The records are then converted into PDF documents and pushed to the CRM. The app also has features to locally store the information while on the move.

The system had a back end web application developed using Python /MySQL that allows the admin to create and design custom form templates which are then used by the sales team to record information.

Business Benefit

- Complete visibility of every stage of the installation process.

- Ease of communication and reporting across all stakeholders.

- Offline storage feature to keep track of the work in progress on the move.

- Efficient data capturing from the various sources.

- Saving work time and money by eliminating the manual paperwork.

- Providing access to important data anytime from anywhere.

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