

Improving project managers' quality of life with improved customer communication

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StraightUp Solar is a residential and commercial solar installer that focuses on projects in Illinois and Missouri. StraightUp provides full solar services from sales to installation to service. The company was founded in 2006 and has installed more than 1,700 projects. StraightUp Solar is a registered S Corp and a member of the Amicus Solar Cooperative.



Website

www.straightupsolar.com



Other tools

Podio (CRM & Project Management)



Consumer psychology is at the heart and the core of Bodhi's design. They think about how people think first and code second.



Mike Hornitschek, VP of Strategic Development
StraightUp Solar

SHORT TERM GOAL

Alleviate seasonal pressure on project managers.

LONG TERM GOAL

Achieve vision of an inspired solar tribe to create a sustainable world.

Life before Bodhi

Missouri and Illinois solar projects are highly seasonal, which meant that at some times of the year, one project manager comfortably oversaw 30 projects while at other times she could be managing as many as 60-70 projects concurrently.

At the same time, the StraightUp team was on the lookout for new marketing opportunities, especially ones that drive referrals and long-term customer relationships. Not only are referrals an effective channel for new sales, long-term impact is a key component of StraightUp's vision of inspiring a solar tribe to create a sustainable world.

Decision to change

The team noticed a marked deterioration in its project managers' satisfaction and quality of life as well as customer satisfaction whenever each manager was managing more than 45 projects at a time. While StraightUp Solar's PMs are skilled at managing projects and engaging customers, the seasonal peaks were leaving them overworked, and hesitant to embrace their growth objectives while maintaining their high standard of responsiveness.

The StraightUp Solar team evaluated Bodhi and felt that it's customer-centric approach had the best potential to help their project managers. Bodhi's referral prompts and automated post-install engagements were added benefits that excited the business development and marketing teams.

The change process

During the first few months after introducing Bodhi, the StraightUp Solar team relied on many of Bodhi's pre-populated triggers, touches, and messages for communicating project progress with its customers. Meanwhile, they gathered preliminary feedback from both project managers and customers.

After about three months, the project managers revamped their internal workflows and refined the sequence of notifications inside Bodhi to better align with the customer experience the StraightUp Solar team wanted to deliver to their customers.

This also meant making changes within StraightUp's project management software, Podio, to more tightly and precisely synchronize event triggers with current and future-state messages to their customers. This ensured that customers would know what's just happened and what was going to happen next with messaging more in line with StraightUp's brand & tone.

Bodhi helps meet your customers where their experiences are. Keep them accurately informed throughout the whole lifecycle and they will be your biggest fan.

Mike Hornitschek, VP Strategic Development, StraightUp Solar

Results with Bodhi

Now, StraightUp Solar's project managers are routinely and naturally using Bodhi to engage their clients as soon as the contract is signed. They also view Bodhi as a messaging assistant, predictably and reliably handling all of the expected and routine communication and document management so that they can focus on more successfully solving the critical and challenging issues that come up in any project, which in turn further increases customer satisfaction. Six months in, the team is already measuring positive improvements in:

- Project manager's quality of life
- Quality of communication between project managers and customers
- Their Net Promoter Scores

Additionally, StraightUp Solar has discovered that when the customer and their project managers have a shared successful experience via Bodhi in building their new solar array, the customer forms a trusting bond with Bodhi that enables a productive long-term marketing and service support relationship between the client and StraightUp Solar.

StraightUp management has also been pleased to see their feedback incorporated into new Bodhi releases, appreciating that Bodhi listens to its own customers to better meet solar companies' needs.

