

Nonprofit Organization Streamlines Operations and Improves Accountability



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Richard de Ocio, Program Coordinator, Proteus Inc.



Customer Profile



Industry: Energy Savings Programs

Location: Visalia, CA

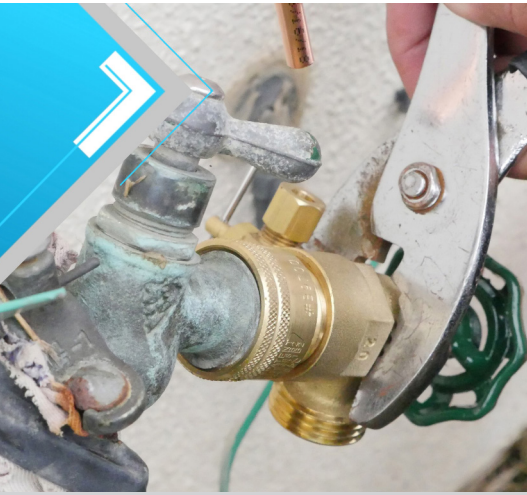
Employees:
Proteus Inc: 300 employees
Energy Division: 68 employees

Website: www.proteusinc.org/index.php/services2/energy

Business Need

Proteus Inc. is a nonprofit organization that has been serving the residents of Tulare, Kings, Kern, Fresno and Northern Los Angeles counties since 1967. Their knowledgeable assessors offer qualified participants a home energy assessment that uncovers energy efficiency issues. Proteus works with local utility companies to improve their home's energy efficiency through approved programs. Proteus provides no cost energy efficiency services that include weatherization services, gas services and electrical services for windows, heating and cooling, evaporative coolers, refrigerators, furnaces and more.

The energy division has grown to include 33 crew and supervisor trucks, a large warehouse and a mobile warehouse. Because Proteus has several different divisions other than their energy division, it became increasingly difficult to track inventory items with the inventory software they had in place. As a nonprofit, Proteus has specific criteria that their crews must follow regarding inventory issuing and returns that require specialized inventory processes. “We’re on a very strict budget,” said Proteus Program Coordinator, Richard de Ocio. “If we go over, we lose.”



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About MarginPoint

MarginPoint is a leading provider of mobile-enabled field service and inventory management software that helps service contractors control inventory costs while improving customer service and growing revenue. The company provides the only supplier integrated solution that addresses the full inventory management workflow for all material regardless of who supplied it or where it is stored. MarginPoint is uniquely focused on integrating the entire end-to-end material lifecycle and job workflow in order to deliver the highest possible ROI to our customers.

Find out more about MarginPoint or request a free demo at <http://www.marginpoint.com/>

Solution

MarginPoint's Mobile Inventory management solution, which helps organizations manage inventory replenishment, optimize business processes and effectively track usage.

Benefits

Streamlined Operations

Prior to implementing MarginPoint, Proteus was relying on paper lists to track inventory usage. Installers would fill out a form with their job number on top and were required to write down every item that was installed in every home. The office would then manually create a paper pick list at the end of every day. Since using MarginPoint mobile inventory solutions, the company has removed unnecessary processes that previously resulted in wasted time, money and inventory tracking errors. And that's especially important because the HVAC portion of Proteus has recently grown from just a couple crews to seven or eight. They've experienced cost savings and less time spent going back to a jobsite because of missing material which has improved their customer service.

Improved Accountability

The lack of inventory visibility often led to installers hoarding materials and spending more than necessary. For Proteus, this was a major pain point. As a nonprofit, they are contracted on a very strict budget by their funding sources. If they should go over their budget, it's an immediate loss and cannot be compensated with additional sales. Since implementing MarginPoint's solution, Proteus has been able to watch the material daily and create min-max levels for each installer, eliminating discrepancies on inventory supply and demand. MarginPoint also allows Proteus to restrict installers from being able to return material or do

cycle counts, a feature that's proved helpful for operations. Richard de Ocio said, "The crews that we started with MarginPoint are doing really well. They're starting to get it."

Improved Billing Processes

With MarginPoint, Proteus is enabled to track monthly material costs and expenses, saving the billing department time sorting through handwritten work orders and spreadsheets. Previously, those calculations would have been completed manually. Now, items issued out in the MarginPoint software are tracked and reported in a standardized issue sheet to be submitted to the billing department. "I love the software. It has made my life much easier," de Ocio commented.

Results

Proteus has seen improvements in:

- > Accountability
- > Inventory Control and Visibility
- > Billing Accuracy

Richard de Ocio said he is pleased with MarginPoint. "Their customer service is phenomenal. They always respond quickly." He was also impressed with MarginPoint's ability to resolve system issues. "They have been by far the fastest in replying, fixing and making adjustments," he said. "We had a crew that wrecked their vehicle. I had to shift them to a different vehicle that was vacant. MarginPoint transferred everything from that truck onto the new truck and it was done by the next business day. We weren't waiting to be able to use our system."