

# CUSTOMER **SUCCESS** STORY





## Elevation Solar

Elevation started with a common problem: high energy bills. The founders, Jerry Coleman and Brian Bair, invested in real estate through two fast-growing businesses, OfferPad and Invitation Homes. In each of the homes they owned, they faced high energy bills – most often the second-highest home expense after the mortgage, even when homes were vacant.

Brian and Jerry set out to learn what was driving up the costs and excessive energy usage, and how they could make their homes more energy efficient. Elevation was born to provide smarter energy solutions to homes at scale.

The business began with rooftop solar but quickly expanded to include energy efficiency when they discovered that in order to create an energy efficient home, they need to not only produce new, renewable energy but also reduce the amount of energy consumed.

In 2020, Elevation acquired Curb Energy to add smart energy monitoring technology to its Whole Home solution. The unique combination of solar, energy efficiency, and energy monitoring technology now provides homeowners with the most complete solution for smarter home energy.

**Headquarters:** Chandler, AZ | **Industry:** Solar Energy & Energy Efficiencies | **Website:** [poweredbyelevation.com](http://poweredbyelevation.com)

## The Challenge

As the Solar and overall energy efficiency space has grown rapidly in the past 15 years – so have the challenges of keeping items organized, efficient, and up to date. Below were the challenges Cirrius was presented with at the inception of the project.

- No ability to work offline and collect the necessary data
- Tracking and dispatching proper technicians was almost impossible
  - ◆ No skill base dispatching
  - ◆ No location based
  - ◆ No capacity based
- Inventory management of current assets was non-existent
  - ◆ No photos or barcode capture capability
- Follow through of data entry by technicians was not happening
- Clients did not have a way of communicating with the technician or way to get an arrival time(s)
- Cell phones, tablets, and desktops were not tied to a central database
- There was no visibility into active service appointments and/or work orders
- Work orders and related line items were consistently inaccurate
- Enterprise reporting on key metrics was not possible for the executive team

## The Solution

Building a robust solution with Elevation required multiple design sessions with the Cirrius Solution architecture team. We had to completely restructure the sales to field service architecture to simplify and streamline the process. We were able to remove all of the custom code and utilize the newly released, native Salesforce functionality. Below is a snapshot of that overall solution:

- Optimization of field service lightning and its natural offline capabilities
- Installation & customization of sharing pix for photos & barcodes
- Added multiple validation rules & required fields for work orders & service appointments
- Built out work order path & guidance for success
- Deployed skill-based dispatching
- Created a customized and optimized dispatch console
- Implemented service territory & mappings
- Added automation of opportunity close-won to work orders & service appointments
- Created work types populating work order line items to create more accurate work orders
- Added automated email alerts to clients
- Tech report(s) creation for expanded abilities beyond the native service report

### Key Success Factors:

Trust  
Follow-Through  
Collaboration  
Strategic Planning  
Foresight

## The Result

The ROI on the final product was realized almost immediately. The flexible field service solution allows for Elevation Solar technicians to streamline see all needed information and effectively communicate with the client. The solution provides better insight into customer relationships, customer assets, and services performed. This consumer-centric, digital-first strategy that Elevation Solar has been pursuing is now paying dividends with record-breaking growth and engagement. Below are a few of the high-level results:

- Increased data integrity from technicians
- Accurate asset management with photos & barcodes
- Increased visibility from management on work orders and service appointments
- Client visibility into work completed by technicians via the tech reports
- Improved customer satisfaction because of real-time notifications
- Efficient dispatching - increasing the attitudes of the technicians and client
- Collaboration with the back-office with invoices due to visibility of service appointments & work orders being completed



“At Cirrius Solutions, customer success is our mission. We work hard to provide our customers with an exceptional, white-glove experience without the luxury price tag. We are built on integrity and greatly appreciate every client relationship. We are proud to partner with high-quality firms like Elevation Solar and we look forward to our long-term partnership!”

**Chad Anderson**  
Founder  
Cirrius Solutions

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