Residential & Light Commercial Contractor Builds on Success with SolarNexus

Company profile

- Allterra is a premier supplier of residential and light commercial photovoltaic systems in the Santa Cruz, California area.
- Established in 2004, Allterra began offering solar in 2008.
- Team Size: 12 employees; 6 of those supporting solar operations full time
- Estimated 2012 Sales: 250 kW$_p$

Business situation

Allterra began as a company working on large, complex engineering projects. When Allterra began offering solar services to commercial and residential customers in 2008, leads were referral-based and came from existing customers and associates. As their solar services developed, they grew their marketing and lead generation efforts.

In 2011 Allterra conducted several marketing campaigns resulting in significant lead growth. By the first quarter of 2012, their lead generation efforts had become so successful that tracking and management of those leads became difficult.

At the same time, their project team was already busy and on the verge of being overwhelmed. Since 50% of Allterra's solar employees are typically outside of the office at any given time, keeping their team organized and productive was paramount. Allterra recognized it needed to improve company communication, organization, and effectiveness.

Allterra is also a SunPower Dealer and needed a way to manage their projects that were sold both through and independent of SunPower.

To manage all of this information, Allterra had been using a combination of Excel, the SunPower Dealer Portal, Clean Power Finance, and white boards for project management and tracking. Files were stored on a shared drive and paper files.

"We needed a solution to reduce the repetitive data entry and keep ourselves from investing more and more time into so many different solutions. We're a solar company and wanted to focus on selling and installing," said James Allen, Allterra's CEO.

> " SolarNexus gives us the tools to make our business more profitable, our clients more satisfied, and our employees happier. "
>
> James Allen, CEO
> Allterra Solar
> www.allterrasolar.com

Technical situation

Allterra began looking at cloud-based systems such as Google documents and calendaring. But the ideal solution was to find an off-the-shelf solution that allowed them to pull together their lead management, sales and project operations all into one system. Enter SolarNexus.

During Allterra's initial SolarNexus adoption, Allterra used the following equipment:

- 2 desktop computers running Windows and Firefox browser
- 5 Apple computers running Firefox and Safari browsers
- 1 file server running OS Server
- Google for web and email servers

Key Benefits:

- Streamlines sales and project cycles
- Faster project execution
- Lowers project costs
- Enables scalable growth and increased revenues

"We saw the potential in having an online solar project management system and believed committing to it would greatly improve our effectiveness over time," said Nathaniel Allen, COO at Allterra. "Having our management, sales, design, and installation teams use one platform to communicate and track our projects has greatly improved our company's operations."

Allterra now tracks and manages all leads and projects with SolarNexus.

The sales manager and sales consultants at Allterra use the SolarNexus Sales Screen as their day-to-day dashboard. The Install Screen has replaced their office whiteboard and is used by the system designer, project manager, permit technician, and installation crews to see which jobs are in progress, and the status of each one.

For example, the project manager will regularly look at the Install dashboard to filter through projects by status or sales owner, or sort all of their projects by scheduled start date or status to get a birds-eye view of what their schedule looks like.

Benefits

Use of SolarNexus has resulted in more efficient operations – some that can be quantified, and some that just eliminate stress and frustration. In sum, SolarNexus saves Allterra about $3000 a month, plus a ton of headaches.

For example, sorting the Installs screen by AHJ makes it easier to group projects by jurisdiction, so that multiple permits can be turned in at the same time. Installation crews that are in a certain area can also perform site surveys or pick up permits. With the use of an iPad, they are able to access all project information remotely. The company also estimates an average of 100 saved miles per week, due to more efficient operations and improved data sharing with project managers and solar designers and engineers.

One of the other noticeable improvements is greater customer satisfaction. When a customer calls, anyone in the office can speak knowledgeably with them about their project and its status, and fewer delays to the project occur. As a result, customers are happier.

Some of the specific ways that SolarNexus helps Alterra's bottom line include:

Faster Project Execution: As a result of completing projects more quickly, Allterra estimates that they generate approximately 15% more revenue and margin per month. At their current sales rate, that translates to about $12,500 in extra revenue a month, and about $2000 in margin. And this additional profit will grow as Allterra's sales increase.

Lower Project Costs: Allterra estimates they save 3.5 hours (or $125 per project) on projects that they manage through the sales and installation processes, or 2 hours of project management time saved per project (or roughly $70 per project) on projects which they only manage the installation. This time savings is due to increased efficiency for file sharing, communication, and project management. For example, the system designer knows exactly where all site survey data and site photographs are located.

More Scalable Growth: Allterra's sales have more recently been increasing by 30% percent and they estimate they will be installing 1 MW_p per year by 2015. By that time, they expect to need 20 more employees.

SolarNexus provides them with the standard processes so training new employees is more efficient and the ability to assign projects to employees clearly defines responsibilities and expectations, improving operations overall.

SolarNexus solutions enable Allterra Solar to provide better and faster service to its customers while keeping costs down. Allterra's management, recognizes that their staff's time is its most important asset, which made it an easy decision to leverage best-in-class web-based business management software from SolarNexus.

By using SolarNexus, Allterra is a more responsive, collaborative, connected and productive team. "We look for ways to scale for the long-haul," explains James Allen. "SolarNexus gives us the tools to make our business more profitable, our clients more satisfied, and our employees happier."