

A New Era of Business Tools: Clean & Polish Transforms with Zoho and Hero's Expertise

20%

growth in the
operations teams

**"Our Zoho system
has transformed our
business model."**

Holly Bentley, General Manager



The Organization

**CLEAN
& POLISH**
BUILDING SOLUTIONS

Clean & Polish is a preeminent leader in the commercial exterior building maintenance industry.

Founded in 1984, they specialize in commercial, industrial, multi-use, museum, hotels and casinos, universities, hospitals and government facilities that span over 50 million square feet in the US mid-Atlantic region, from New Jersey, New York to the DC metropolitan area. They provide a wide range of exterior building maintenance services that include but are not limited to window cleaning, glass restoration, pressure washing, caulking, sealing, garage cleaning/sweeping, and architectural metal restoration and maintenance.



The Challenge

The team recognized they needed a more robust solution that could handle the entire customer journey - from initial customer contact through to invoicing - within a single platform.

The Clean & Polish team were long-time users of ACT! CRM, but by 2015, they found that the system was falling behind in terms of functionality and updates. The CRM lacked essential features, updates were infrequent, and managing licenses became increasingly burdensome. Managing jobs and scheduling on the other hand, was an area of their business operations that remained manual, complicated, and time-consuming. The team did all of their scheduling using “big, gigantic calendars” located in the office where jobs were scheduled using pencils in case changes needed to be made. Its in-office location was crucial for account executives to manually check on their clients jobs, and to follow-up with the operations team where needed.



The Search

From the start, the Clean & Polish team felt assured by Hero’s approach, confident that the recommendation was made with their best interest in mind, and trusting that the focus was on finding the right solution and not just making a sale.

Clean & Polish began their CRM search with Salesforce, but quickly found that it didn’t meet their needs. The high cost and sales approach were not a good match for their team, prompting them to explore other options.

Through their ACT! Consultant, they were introduced to the Hero Technical Solutions team, who then introduced them to Zoho.



The Solution

Since starting with Zoho CRM years ago, Clean & Polish has since expanded its use of Zoho to transform other key areas of their business.



With the exception of email and Quickbooks, the company now operates entirely on Zoho. Zoho CRM has enabled Clean & Polish to operate with greater accuracy by automating tasks, tracking sales and contract signing, enabling access to real-time data, and allowing the sales team to manage the entire customer journey from a single platform.

Once a service contract is won, the details are pushed over to the Job Application in Zoho Creator for operations to manage and schedule the jobs.

The Job application is used for “everything”, as stated by Clean & Polish General Manager, Holly Bentley; including tracking jobs, services, workers, scheduling, licenses, operations plans, commission tracking, and more. The custom dashboards and reports have further enhanced transparency, communication and coordination between their account executives and the operations team. For example, upsold reports allow field workers to refer clients directly to account managers, improving both efficiency and client engagement. Since the implementation of the Job Tracking application, the operations team has grown by 20% in response to the increased volumes of jobs that the team can now handle, while the administrative team has remained the same given the significant reduction in administrative overhead.

In partnership with Hero Technical Solutions, Clean & Polish has steadily iterated and implemented additional improvements to their system over the years. These smaller projects have included syncing data from Zoho Creator to Zoho Analytics to enhance accuracy and transparency of commission tracking among their Account Executives; and implementing workflows in CRM to send and track email service reminders to clients, in order to minimize time manually spent tracking responses by the scheduling team.

Hero’s deep understanding of the Clean & Polish system and operations has played a critical role in their partnership, consistently offering innovative suggestions that Clean & Polish hadn’t previously considered, but which have delivered significant results for the team.



The Lessons Learned

One of the biggest lessons that Clean & Polish General Manager Holly Bentley has learned throughout this process is that, “working with the right people is key”.

Having worked with founder Len and his team at Hero Technical Solutions for several years now, Holly indicates that it now feels like Len “is a friend”.

She and her team have received non-stop support from Hero every step of the way pre- and post-implementation of Zoho, and the relationship has been a positive experience all the way through.



Benefits

- 0 additional administrative staff required
- 20% growth on the operations team



Key Apps

- Zoho CRM
- Zoho Creator
- Zoho Analytics