

FAMILY-OWNED FLOORING AND REMODELING COMPANY BASED IN BREVARD COUNTY, FL



Objectives

- Establish a consistent method to track customers and projects, accessible to both store and warehouse employees.
- Streamline appointment scheduling and include comprehensive project information.

Benefits

- Clear separation of Sales and Operations data.
- Enhanced appointment tracking and scheduling efficiency.
- Improved organization and scalability for future growth.

Client Overview

The client, a family-owned flooring and remodeling company based in Brevard County, FL, faced two primary challenges. They needed a consistent and accessible system for tracking customers and projects, both at the storefront in Viera and the flooring warehouse. Additionally, they sought a streamlined approach to scheduling appointments while ensuring all relevant project information was readily available. These objectives were addressed through a comprehensive solution provided by TechHouse.

Solutions

TechHouse tackled these goals by integrating Dynamics 365 for contact management, streamlining email tracking, and offering thorough staff training for seamless Microsoft environment integration. They also employed Power Automate to automate folder creation in SharePoint, efficiently segregating customer-centric and warehouse-specific data. The outcome: enhanced organization, smoother processes, and increased scalability for the client.