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**CLEAResult**

As a fast-growing energy optimization design and implementation firm, CLEAResult faced operational challenges including an increase in the amount of data and documentation that needed to be created, revised, shared and stored across a distributed network of employees. By implementing Intuit QuickBase as a centralized platform for creating new business applications, CLEAResult has gained efficiencies in all aspects of its operations.
The challenge

- Energy savings documentation without version control was unreliable
- Information collected by field personnel wasn’t always complete
- Updating utility clients on a project status took staff time and resources
- Engineers were not always given up-to-date information for review
- Priority of energy efficiency projects couldn’t be easily adjusted as needs changed

The solution

- Version control tracked revisions to energy savings documentation
- Database rules ensured completeness of the field data that was collected and shared
- Dashboards gave program team members instant online access to a project’s status
- Customizable views streamlined engineering reviews and sign-offs
- Project reporting, email alerts and reminders kept energy efficiency projects on schedule

The benefits

- Staff time spent on administrative tasks reduced by 14 days
- Engineering rework time reduced by 70%
- Program cycle times reduced by 50%
CLEAResult built its business and its reputation on developing end-to-end energy optimization programs to help consumers and businesses save money. Its hard work has paid off in business success. Since 2005, CLEAResult energy programs have resulted in more than one billion kilowatt hours of reduced energy use in schools, government buildings, commercial facilities and individual homes. Additionally, the company has appeared on the Inc. 500 list of the fastest-growing private companies in 2010, 2011 and 2012.

But with business success came operational challenges that included an increase in the amount of data and documentation that needed to be created, revised, shared and stored across a network of field personnel, program managers, engineers, customer service representatives, and evaluators—across state lines and time zones.

With no clear insight into energy efficiency project data, engineers were not always working with complete information, which sometimes resulted in engineering reworks that cost the company added time and money. But more important, the energy savings data that CLEAResult program managers used as a basis for their energy plans was cumbersome to maintain.

"Change control was a big challenge for us because we have to justify our savings data," said Chad Brustin, professional services IT manager at CLEAResult. "Everything had to be evaluated by both utility clients and third-party auditors, so we needed to be sure that our calculations were accurate and defendable."

**Energetic workflows out of the box**

Brustin knew he needed a Web database to manage the data on an enterprise scale and to provide transparency into the process for utility customers and auditors. Yet his IT resources were limited and his users' technical skills varied. He evaluated Microsoft Access, but felt it would be too complex to roll out to his user base. He ultimately chose Intuit QuickBase for its security, flexibility and ease of use.

"When we started using QuickBase in 2009, we needed something to work for us companywide right out of the box, because we had an IT staff of two to service over 150 employees in seven regional offices," explained Brustin.

Brustin first built a project management application from scratch — and without programmer assistance — to manage the full life cycle of CLEAResult’s energy programs, from the signing of the memorandum of understanding to the sign-off on a project’s energy savings. Program data that came in from field personnel in the form of spreadsheets, documents and photographs could be uploaded to a central online database for anytime, anywhere accessibility by everyone on the team who needed to see it—without having to wait for information to be emailed.

Program managers had version control on their energy savings data documentation so they could see when data was changed—and by whom. They also had the ability to monitor
program progress and could adjust deadlines and reallocate resources as needed to fast-track priority projects with a few simple keystrokes.

Program account leads could see where their project was in the queue and the status and outcome of field inspections. Business rules built into QuickBase would send an email reminder when the status of a project changed. Moreover, projects that took more time than average to complete could quickly be identified.

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And engineers had a clear view of program specifications submitted by field personnel and program managers—critical details they needed to have in one place for streamlined reviews, inspections and sign-offs—without having to spend time going back for missing information.

“QuickBase was part of our basic program for building trust among our internal teams by letting them see where we are in the process and how we’re getting there,” said Brustin.

Other applications were built out as needed, including custom applications for inventory tracking, marketing, HR, IT and customer service. Brustin estimates that he managed more than 400,000 bytes of data in 23 applications using QuickBase, a task that would be nearly impossible without the tool.

“With continuous process improvement occurring during the startup of an energy efficiency program, our database needed to be able to adapt quickly. QuickBase provided us with the ability to roll out fast—and stay up to speed with changing business requirements to meet stakeholder requirements,” said Brustin. “I could simply change a few data fields and push a few buttons, and be up and running with a working application within an hour.”

Smother operation fuels better business outcomes

In the three years since deploying QuickBase, business at CLEAResult is better than ever, due in part, says Brustin, to the efficiencies the company has gained in all areas of its operations. QuickBase allowed CLEAResult to focus on building processes and business systems rather than relying on people.

Staff efficiency was improved by having program data stored in a centralized online location, with rules in place to alert the team if information is omitted or tasks are missed, improving the outcome of inspections and reducing the occurrence of costly engineering rework.

More than 20 hours per month of administrative resources were regained and according to Brustin, CLEAResult has consistently met energy savings goals since QuickBase was deployed.

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