

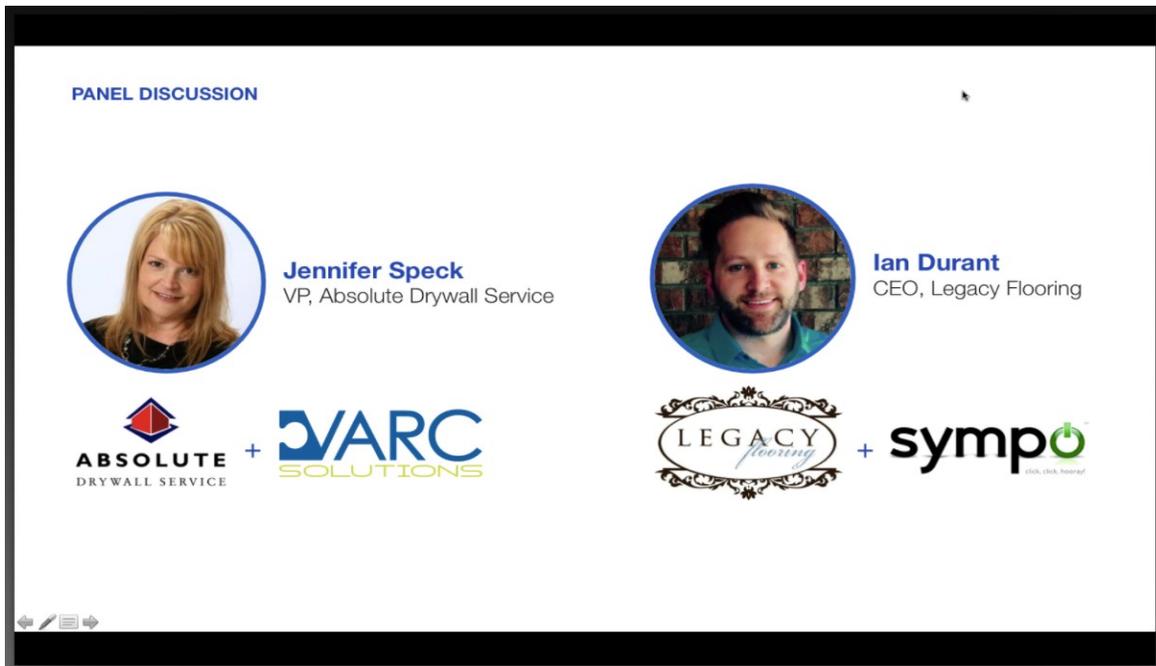
QuickBase Webinar Notes

Scale Your Business, Keep Your Sanity

9/22/15

Ian Durant, Legacy Flooring
Jennifer Speck, Absolute Drywall

Compiled by Kris Freeberg, Economist, [Making End\\$ Meet](#)



- Jennifer Speck: stay hungry & humble, keep track of what's really happening, not just what should happen. Track customer complaints, mistakes.
- Error reports help manage by exception.
- Pain points, feedback, employee engagement
- She has no web site; they build business via relationships. But they do use QuickBase to manage those relationships.
- Ian is big on reports and on staying proactive.
- He tracks time & phase, progress on installations, job categories.
- Managing busy & slow seasons.
- There are a lot of lagging indicators
- Helps him gear up for spikes.
- He depends on 50+ reports
- He's all about being prepared for growth. Hates surprises.
- Jennifer has Hispanic field workers. 97% of her work force is in the field. She has been able to create interfaces & alerts in Spanish.
- Quick, accurate reports = expedited billing, cash flow.
- Ian's installers aren't linked into the system. Managers have access. 80 install teams.
- "What were you looking for?"
 - Jennifer:
 - Cost. Out-of-the-box solutions were prohibitive.
 - Her QuickBooks trainer saw her "spreadsheet from hell."
 - Cloud-based, multi-user was really helpful.
 - Easy to create/modify reports. No costs or delays to make changes.

- Biggest thrill: replacing manual records & procedures. “Make it happen.”
 - Creating purchase orders . . . pieces, prices, orders, one-offs.
 - Comparable to not having to remember phone numbers any more with smart phones.
 - Ian:
 - Automation
 - Phone calls
 - Estimates
 - Installations
 - Clients
 - Estimators
 - Make sure customers are being called in a timely manner
 - Full work flow
 - Allowed them to take a step back, see how the company is “moving & breathing.”
 - Averting human errors that compound with massive growth, letting things fall through cracks; identify cracks; use QuickBase to fill those cracks & voids, keep work flow as seamless as possible.
 - Manage orders through multiple departments, from Estimating to Installation.
 - Had been using disparate systems that tended to break down or crash.
- “How has technology affected the ways you measure success?”
 - Jennifer:
 - She'd like to forecast more like Ian does.
 - Weather
 - Seasonal
 - Turn-around for billing, cash flow
 - It used to take her six weeks after the job was finished to bill.
 - Speed of billing is especially valuable when you're dealing with jobs where purchase orders haven't been issued in advance.
 - Ian:
 - Quick invoicing.
 - Integrated with QuickBooks.
 - Helped minimize administrative overhead, bookkeeping departments & staff.
- Estimating
 - Jennifer:
 - Estimating per plan. She has a model/template.
- Customization: how easy is customization for you?
 - Jennifer:
 - It's so easy that I do it too much, create TMI.
 - Ian:
 - Defining roles.
 - Really dig in deep to understand your work flow & foresee how it will work in the future after you've grown. Have a growth map, built the app to fit the map.
 - When you're small & you have one person wearing five hats, document what they do; break it down & create specialized roles. Move away from multi-tasking. It's not good for anyone.
 - Having a key generalist multi-tasking person makes the company vulnerable if they lose that person, like losing the company's brain or nerve center.
 - They used flow charts, outlines . . . gave their QuickBase experts their outlines & flow charts, & they made sense of it & helped design the app. Getting it out of your head & onto something else is vital.
 - Work flows: who touches what, and in what order? What should they see & not see?
 - Refining views never ends as the organization grows.
- Roles & Permissions: how do you use/manage them?

- Jennifer:
 - Only enter data once.
 - Pricing
 - Wages