

# CUSTOMER SUCCESS

## MEET



**Who:** Smart Energy Inc.

**What:** Home energy efficiency consultants & providers

**Where:** Deerfield Beach, FL

**Web:** [www.floridasmartenergy.com](http://www.floridasmartenergy.com)



Headquartered in central Florida, Smart Energy Inc. are committed to making renewable energy available and affordable to potentially every household in the region. Originating in Los Angeles, after thousands of successful solar installations, the company decided to bring their experience and expertise to Florida, the sunshine state. A virtual one-stop-shop for home energy efficiency needs, Smart Energy offers its customers substantial long-term savings by implementing the latest energy saving technologies.

Smart Energy is not just a solar company. Dedicated to energy remodeling and a true holistic approach to creating a revolutionary home that runs comfortably and efficiently, Smart Energy strives to ensure customers'

homes generate sufficient power from its solar panels. Smart Energy's energy-saving products and services include free energy analysis, site survey, engineering, financing, permits, installation and ongoing monitoring programs with country's leading solar companies. The company also provides comprehensive project management in cooperation with leading US-made solar panel manufacturers, installing quality solar energy products guaranteed for up to 25 years. To help protect the environment and in turn, give back to the local community, Smart Energy supports local charities and non-profits through the 'Everybody Solar' campaign, to help integrate solar power into these organizations.

## CHALLENGE

The renewable energy industry is one of the most vibrant, fast-growing sectors in today's economy, with global investment topping nearly \$400 billion in 2016. The market is driven by the greater demand for energy and the steady decline in non-renewable energy sources, such as petroleum, coal, and natural gas. Increased demand also invites competition and a surge of new market players. To keep pace and remain competitive, the team at Smart Energy knew they had to broaden their product offering and more importantly, gain tighter control of their operations.

"We knew it was time to get a business management system on board," said Smart Energy Founder & CEO, Noam Yahav. It had been some time since the company had updated their in-house software solutions. They were also deploying a CRM (Customer Relationship Management) system that could no longer meet their needs, especially when it came to managing communications with customers, subcontractors and business partners. Over time, the system couldn't efficiently analyze data, impacting project efficiency and duration, and sales growth. "Our CRM used to handle reams of customer data and the majority of our sales tasks, but that's no longer the case," added Yahav. "Because we've had to rely on different software solutions under one roof, we would spend valuable time and effort on IT, instead of focusing on our customers and prospects."

## SOLUTION

With a CRM that couldn't keep up with their accelerated sales process, support end-to-end sales management, such as lead generation, customer lists, sales orders, purchasing, and customer's financial data, Yahav knew it was time for change. They not only needed to enhance their overall operations, but to remain in the running as a leading renewable energy provider, implementing an ERP system was the next logical step. "In this industry, we're constantly developing new products and services to better serve our customers," says Yahav. "But we're also tackling new technologies, so we can attract new customers with a more robust and more environmentally-friendly offering."

With the decision to invest in ERP already in place, it was time for the company to scan the market for the most cost-effective solution to meet their needs. The team sought out some of the more popular vendors and requested a demo. "The larger vendors, although impressive, showed us complex systems that would take months to implement, let alone train our staff and getting everyone onboard. We knew we needed a flexible ERP system that would grow as our business grows. Hands down, this is why Priority ERP was our first choice and since then, we've never looked back," said Yahav.

Smart Energy chose Priority cloud ERP because of its ease of use. Unlike other ERP vendors, Priority offers on-premise and cloud solutions, both with 100% system functionality. For Smart Energy, this meant enjoying all the fundamental elements of on-premise ERP – on the cloud. Priority's cloud ERP system functionality offers primary modules such as finance, logistics, human resources, time and attendance, BI, project management and a built-in CRM, to replace Smart Energy's current in-house systems.

Implementation by Priority's local project team was not only fast, but on time and on budget. "There were no surprises," said Yahav. "Priority promised and Priority delivered. We've made changes to the system along the way and because we were properly trained by Priority, there wasn't anything we couldn't handle ourselves. Priority's high level support raises the bar on customer service and our questions are always quickly by a professional tech support team."



## RESULTS

We asked Yahav and the team how Priority helped change the way they work. "It's all about the data," said Yahav. "With Priority cloud ERP, we can access our data from anywhere and at any time. This means that we can work outside the office, at customer sites and even on the go. We save on time and resources, plus being more on site, we're able to maintain closer relationships with our customers. With cloud ERP, we can also quantify our results. The company's operating costs, from admin, to finance, to human resources, have decreased nearly 20%." Yahav also noted a significant boost in system performance. "Cloud ERP means virtually no system downtime, and we no longer need extensive hardware, servers and IT resources to carry the load."

With the onset of more robust and reliable technologies in the renewal energy market, Smart Energy is primed and ready to meet new challenges and customer demands. "With Priority ERP, we've strengthened our digital transformation and as a result, we're continuing to make a real difference in the quality of people's lives. Thanks to Priority, we can increase and maintain a competitive edge. Simply put, we don't work harder, we work smarter."

**THANKS TO PRIORITY, WE CAN INCREASE AND MAINTAIN A COMPETITIVE EDGE. WE DON'T WORK HARDER. WE WORK SMARTER."**

NOAM YAHAV, FOUNDER & CEO