

Accelerate at the Speed of Digital: RF Installation's Efficiency Breakthrough with Youreka



CASE STUDY

SUMMARY

RF Installation (RFI) is a home improvement company specializing in installing doors, windows, kitchens, and window treatments across 38 states. As a key partner for Home Depot, RFI relies on a network of independent contractors and employees. RFI transformed their field operations with Youreka and Salesforce Field Service, moving from a custom app to a more efficient, Salesforce-native digital workflow. The company dramatically reduced form creation time, improved data collection, and streamlined its operations to ensure compliance with stringent federal regulations across multiple states. This digital transformation has allowed RFI to enhance their service delivery, complete more visits per day, and positively impact their top-line revenue.

THE CHALLENGE

Inefficient Workflow and Data Management:

- Relied on a paper-based system with manual data entry, leading to potential errors and long administrative processes
- Data was fragmented across multiple systems (paper, PDFs, Dropbox, outdated database)
- Previous custom app lacked seamless integration with Salesforce, leading to inefficiencies and higher maintenance costs

Lack of Real-Time Information and Collaboration:

- Paper-based system hindered real-time access to customers and repair information
- Limited ability for independent contractors to collaborate efficiently on projects

Excessive Administrative Workload:

- Time-consuming administrative tasks restricted the program's capacity
- Contractors spent most Fridays on paperwork instead of serving customers

INDUSTRY:
Home Improvement

LAUNCH DATE:
05/2023

LOCATION:
Grand Prairie, USA

SALESFORCE PRODUCT:
Salesforce Field Service

USE CASES:
Field data collection, form creation, and document generation

“Our outdated systems and paper-based processes were holding us back. Working with contractors across 38 states, each with unique regulations, was incredibly complex. We needed a solution to streamline operations, ensure compliance, and allow us to scale efficiently while reducing the administrative burden on the contractors.”

Jason Boor
Business Intelligence and Data Manager



The Solution

- **Salesforce-Native Mobile Data Collection:** Youreka, as a Salesforce-native application, seamlessly integrated with SFS. This allowed individual contractors to capture data, manage photos, and complete work orders digitally on-site using mobile devices, eliminating paper-based processes and reducing maintenance costs.
- **Intuitive Form Building and Modification:** Youreka provided RFI with a user-friendly interface to create and modify complex forms rapidly. This flexibility enabled quick adaptation to changing business needs across 38 states, significantly reducing form development time.
- **Real-Time Updates and Collaboration:** The solution enabled real-time access to data, improving communication and decision-making across the organization. This centralized approach enhanced collaboration and provided immediate visibility into field operations.
- **Automated Compliance Coverage:** Youreka's form creation capabilities allowed RFI to quickly adapt their processes to meet stringent federal regulations across multiple states. This flexibility helps reduce the risk of non-compliance and potential fines.

“Youreka has streamlined our document generation process significantly. We're now on track to generate over a million documents annually, all based on data collected through Youreka. This level of efficiency was unimaginable with our previous systems.”



“The simplicity of Youreka's form-building interface is its biggest advantage. We can now drag and drop questions, create complex forms, and implement changes in a fraction of the time it would take a development team. This flexibility has been crucial in managing our operations across 38 states with varying requirements.”

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The Results

97%

Reduction in
complex form
creation time

2-3 Hrs

Eliminated in
post-visit administrative
work per job

100%

Improvement in
measurement reporting
speed

RF Installation's implementation of Youreka has led to significant improvements in efficiency, productivity, and customer service. The digital transformation has yielded impressive results across various aspects of their operations.

- **Accelerated Form Development:** A **97% reduction** in complex form creation time, **from 2-3 months to just 2 days**, has dramatically improved RFI's ability to adapt to changing business needs and regulatory requirements.
- **Streamlined Documentation:** Over **1 million documents** are now generated annually through Youreka, centralizing data collection and improving accuracy across the organization.
- **Enhanced Field Productivity:** By **eliminating 2-3 hours** of post-visit administrative work per job, independent contractors can focus more on customer service and complete more jobs per day.
- **Rapid Reporting:** A **100% improvement** in measurement reporting speed, from up to 2 weeks to same-day, has significantly reduced potential lost sales opportunities and improved customer satisfaction.

This digital transformation has positioned RF Installation at the forefront of the home improvement industry, enabling them to provide faster, more efficient service while maintaining the highest standards of quality and compliance. The company is now better equipped to scale its operations, respond swiftly to market demands, and continue its trajectory of growth and success.



"Youreka has transformed our form creation process. What used to take us 2 to 3 months of development time can now be accomplished in just 2 days. This dramatic improvement in efficiency allows us to adapt quickly to changing business needs and regulatory requirements."

To learn more about how Youreka helps companies create breakthrough efficiencies, please contact us.



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