

CASE STUDY:

HOW SONOMA VALLEY POOL & SPA SAVES HUNDREDS OF HOURS

Industry: Service Industry

APPS USED

- Weekly Service Notification
- Weekly Pool Service Report

HIGHLIGHTS

- Improved customer service
- Differentiated from competition, creating a significant advantage

BACKGROUND

[Sonoma Valley Pool & Spa](#) offers premium pool service and repairs to the heart of American's Wine Country: Sonoma, California.

Husband and wife team, Saul and Jolie Rozema aren't just focused on the pools they maintain, but also the clients they serve. Each weekly visit requires chemical testing and maintenance of the pool.

In the past, all of their service notifications were filled out by hand. However, these paper forms caused additional work. The tags that were left could easily get lost. In addition, clients would often inquire about the services provided. If the wind had blown leaves into a pool shortly after a service call, they couldn't be sure if a cleaning had actually occurred.

Sonoma Valley Pool & Spa needed a process more reliable than paper forms.

SOLUTION

In January 2013, Sonoma Valley Pool & Spa addressed this business challenge by turning to Canvas, the global leader in mobile apps for businesses. Thousands of organizations leverage Canvas's cloud-based, "Software-as-a-Service" mobile app platform to replace cumbersome paper forms with highly customizable mobile business apps that improve their data collection and productivity.

Businesses can search from over 14,000 ready-made apps in the Canvas Application store that can be customized to an individual business user's needs. In addition, Canvas offers a do-it-yourself app builder that enables non-technical users to build apps in minutes.

They started with apps from the Canvas Application Store, including the 'Weekly Pool Service Report' from Canvas's partnership with Deluxe. Deluxe has decades of experience with business forms and Canvas was a perfect match to help Deluxe create mobile versions of their forms. While Saul and Jolie hadn't been customers of Deluxe previously, they love using their mobile forms.

Now Saul fills out his service reports on his tablet. With Canvas he can:

- Include a time stamp and GPS location capture for his work, so clients can rest assured that the service was performed.
- Add photos of his work to better explain any issues or malfunctions that need repair, reducing time spent explaining issues to customers.
- Track the chemicals he uses at each job, and time spent on both repairs and cleaning.
- Email a customized PDF to clients with his work, including the photos, and any repairs that their pools may require.

RESULTS

Saul has ditched the clipboard for a tablet, having turned all his forms into mobile apps. Sonoma Valley Pool & Spa has seen dramatic results from their switch, including:

Real Time Savings

Sonoma Valley Pool & Spa has saved hundreds of hours due to optimal communication with their customers and faster invoicing. Previously, Saul took down all service notes with pen and paper. He'd leave a tag at the pool.

Yet clients could easily lose their tag receipts for cleanings from wind or other weather factors. This slowed down their sale cycle as well as customer response time.

Communication was also difficult before switching to Canvas. Coming back to preform repairs on a swimming pool took longer as well. Customers were often confused by what service was needed. This confusion required extra time on the phone explaining issues or additional visits to clients' homes at no cost.

Today, Saul fills out the form once on his iPad. All his service tags go immediately to the cloud. Instead of retrieving carbon copies, customers enjoy clean PDFs. Instead of long technical notes, customers get easy to understand visuals of the problem.

Canvas saves Sonoma Valley Pool & Spa time in multiple ways. Saul and Jolie have less administrative work. All the service tags, including photos and any notes, go immediately to the cloud. With bulk downloads in Excel or CSV files, it's easy to integrate this information into their own systems.

In addition, customers have a better understanding of the work done from the beginning, and so have fewer questions or concerns. This means less time on the phone and more time doing billable work.

Differentiation from Competition

Additionally, Canvas differentiates Sonoma Valley Pool & Spa. "One of my biggest selling points," Saul says, "is the digital service tag." While competitors continue to leave paper, Sonoma Valley Pool & Spa's customers get branded PDFs straight in their inbox. They love getting his emails with visuals. "Some look forward to it every week." Saul explained.

Sonoma Valley Pool & Spa's business has never been better. Today the company only relies on word of mouth, coupled by their web presence. "We have a wait list now" Saul notes, "and we're not even in the Yellow Pages anymore. It's just our reputation and our website." Still his waiting list grows due to customer referrals.

"I can't imagine any service type business not profiting by using Canvas. From landscapers to pest-control, I don't see a single type of industry that wouldn't benefit from optimizing productivity and presenting your clients with professional e-mail based communication." –Saul Rozema

Flexibility to Meet Evolving Business Needs

As a cloud-based, mobile platform combined with an easy-to-use mobile app builder, Canvas provides Sonoma Valley Pool & Spa the flexibility to add new features and functionality to any of their mobile apps. As needs evolve and change, Canvas makes editing apps a frictionless process.

For instance, as their materials change, it's easy for them to upload a new list of materials and new prices into their Canvas apps. They don't need to rely on IT support or have any knowledge of coding. With Canvas, it's a simple drag and drop interface that anyone can use.

Other mobile app alternatives make this process cumbersome or costly, weakening the effectiveness of their platforms. With Canvas it is a frictionless process at no additional cost.

With one switch, Sonoma Valley Pool & Spa has saved paper, time and money that has more than paid off its investment in mobile apps. Canvas has given this company an easy-to-use mobile experience that allows the company to focus on doing quality work for all their customers.