

Footprint

Northern and Southern California

Number of Techs

55

Number of Maintenance Contracts

2,500

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“We’re capturing XOi content—physical video, pictures—onto quotes which has expedited how fast those quotes are approved. We seem to get less contested quotes, less questions.”

JASON SAUNDERS
Service Operations Manager

Overview

SitelogIQ is a full-service facilities solution provider with 170 employees work in the field, and 55 technicians dedicated to the service business doing repair, maintenance, and warranty work serving the state of California. The company specializes in mechanical contracting, HVAC, and energy projects.

Although they initially purchased XOi to help technicians, the company realized many additional benefits, including increased customer transparency, more efficient workflows and processes, standardized lead handling workflow, expedited customer quote acceptance, new training material, and more.

“If we can show them rather than tell them, it gives them a nice verification,” explained Service Manager, Eric Yocum. “We’ve had some customers tell us right away that they want video on every future work order.”

Partnering With XOi



Improved the clients’ perceived value of mechanical services



Improved workflows throughout the organization, resulting in greater efficiency



Helped property managers provide better documentation to offsite supervisors and building owners



Shortened the time needed to get quotes approved by clients and reduced the questions customers have about quotes



Eliminated most of the data collection from field service calls



Started creating a video training library featuring senior journeymen



Reduced lead time for sales follow-up on field-originated opportunities from two weeks to one or two days