

Stan's Raises the Temperature of Executive Analytics Initiative with BT Partners and Domo

Industry	Client Since	Solution
HVAC, PLUMBING & ELECTRICAL	2022	Domo

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CFO
Stan's HVAC, Plumbing & Electrical
Wagner Mechanical

Based in Austin, Texas, Stan's Heating, Air, Plumbing and Electrical has been providing residential customers with a range of HVAC, plumbing, and electrical services since 1954. It remains a healthy, growing enterprise because of its well-earned reputation for exceptional customer service. While companies in the construction industry can be slow to embrace new technology—particularly back-office tech—Stan's embraces it. This company understands the competitive advantage technology can deliver—which is why Stan's partnered with BT Partners and Domo.

The company has been on a continual growth trajectory for much of its history, growing organically and through the acquisition of similar organizations. It recently purchased a mechanical contracting enterprise in New Mexico and added an electrical division. “We’ve gone through several ownership changes during our history as well,” notes Tim Bint, Stan's CFO. “In 2018, a private equity (PE) firm purchased us. That change, in particular, led us to look for a tool like Domo.”

Strong ServiceTitan Integration

Tim explains that the fundamental nature of data reporting changed following the sale. “PE firms want a whole new level of KPIs and analytics. We needed to step up our game and deliver the meaningful reports we all need to make better, faster decisions.”



One challenge Stan's faced stemmed from its home services division's reliance on ServiceTitan, a field service and dispatch application used by many contractors. “It's great at what it does, but it doesn't have robust reporting,” Tim says. “We had to go through the vendor to customize anything, and we didn't have access to ServiceTitan data in conjunction with our other data sources.”

Around the same time, Stan's upgraded its accounting application from QuickBooks to Sage Intacct. “While Sage Intacct was world's away from QuickBooks as far as capabilities, we still effectively had two standalone systems—Sage Intacct and Service Titan,” Tim notes. “ServiceTitan holds granular, transaction-level data, and Sage Intacct holds higher-level data spanning the entire company.” Stan's needed an executive analytics platform that could help it bring together disparate data and turn that data into strategic insights.

A Synergy of Expertise

As Stan's management team strategized with their PE firm, one of the partners recommended we speak to BT Partners. Tim also received a referral from Service Champions, a large HVAC contractor who uses Domo, Sage Intacct, and BT Partners. “We heard rave reviews and engaged with BT Partners in 2022.”



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BT Partners' implementation approach set the project on a path to success. "They worked through a comprehensive discovery phase, spending time learning how we see the world and our ultimate goals," recalls Tim. Next, they dove deep into both ServiceTitan and Sage Intacct to understand the data held in each application and studied both applications' APIs. When BT Partners found that many of the data fields needed weren't available through ServiceTitan's API, they went directly to ServiceTitan and got them added.

Quick Wins with Domo

Business intelligence projects have earned a reputation for being lengthy affairs, but Tim and his team were impressed by the pace BT Partners kept. "We had meaningful reports to share with our stakeholders in under two months," he says. "It was a rapid proof of concept and we demonstrated early wins to our PE partners. There is no doubt that Domo was worth the spend. It began paying for itself almost immediately."

Advancing Excellence

In Stan's home services division, it can sometimes take three to four trips to the same house to successfully resolve an issue—with only one of those trips being revenue-generating. "BT Partners created a Domo view that helped raise our teams' awareness about how many unbillable trips we have. They could review whether the subsequent trips were due to a lack of a spare part, for example, or whether certain technicians had more or fewer repeat trips. Managers used this data to make changes, and as a result, we've reduced the number of repeat trips by 10%."

Win rate is a key metric for every business, but Stan's struggled to calculate an accurate rate. ServiceTitan held the raw data, but Tim and his team had to move this data into a series of spreadsheets to perform analyses. It was a time-consuming, opaque process. BT Partners created a Domo report that does the heavy lifting. "We gained visibility into win rates that we didn't realize we were

lacking," says Tim. "Uncovering and organizing the data raised awareness among our sales reps and managers, helping everyone see what steps lead to more success."

Strategically-Informed Marketing

Impressively, Domo can connect to just about any database. BT Partners is leveraging diverse sources such as weather and permit data and triangulating them. The result can be as brilliant as a report sorted by zip code, showing what types of products and services are selling best—and which salespeople are doing the most selling. "We're able to focus and target our marketing efforts in ways that were impossible before," says Tim. "For example, we saw that a certain zip code was impacted by frequent power outages, meaning homes there might be good candidates for our generator installations—so we direct our marketing efforts accordingly. When we can focus our resources like that, we improve our conversion and customer satisfaction rates."

Stan's has remained strong during the past year's challenging economic times. "We've seen our business remain stable while our competition has declined by 7-8%. I firmly believe that our ability to dig deep and use data contributed to our stability," Tim says.

Unrivaled Partnership

Tim credits BT Partners as the best systems integrator he's ever worked with. "I've been through 20-plus implementations, and BT Partners is the best. They know Domo inside and out. They are incredibly talented but not arrogant—the only agenda they have is to help us succeed. They love to learn about our business and continually make strategic recommendations based on what they've learned and what they know about Domo."

He concludes, "Every associate we've worked with has outstanding technical skills, and they're also good at listening to the customer, uncovering what's important, and translating that into actionable information."