citrix™

Podio powers efficiency through automation for Fusion Power

Leading Arizona solar business generates key benefits

A serious approach

Living in Arizona presents some challenges. The state averages nearly 4,000 hours of sunshine a year, and regularly records the world's hottest temperatures. Domestic power consumption rates are, as a result, among the highest in the US, with most residences using electricity for both cooling and heating.

Unsurprisingly, solar energy is big business—and competitive. As an end-to-end supplier and installer of domestic solar energy systems operating across Arizona and into Texas, Fusion Power take every opportunity they can to ensure that their operations are as efficient as possible. "There's over 100 years of solar experience here at Fusion Power," says Chief Operations Officer Jason Gallagher. "And we take our approach to technology very seriously."

Peeking under the hood

Fusion Power's first experience of Citrix Podio came nearly six years ago when the business was looking for a more effective means of tracking leads and sales than using multiple spreadsheets and emails scattered across the business. "One of our partner businesses was operating on Citrix Podio, so we were able to get a peek under the hood," explains Gallagher. "What we found was a product that could build as we grow."

After demonstrations from the partner of Citrix Podio's overall concepts and how to build workflows and templates, Fusion Power completed the main implementation process in-house, using Podio initially as a solution to manage potential leads and then sales. This was quickly followed by an extension of the use case to Fusion Power's human resource database, handling worker profiles and other personnel-related information. "From there we just built it out ourselves," says Gallagher.

fusionpower

Industry
Energy and Utilities

Location
Arizona, USA

Citrix products
- Citrix Podio
- Citrix RightSignature

Individual but connected workspaces

Deployment of Citrix Podio grew quickly. Fusion Power developed functionalities to handle rebates and expenses, using Podio to track the customers and projects to which they related. Fusion Power then began to develop individual 'Podio workspaces' for specific parts of the business, starting with an area where designers and engineers can operate and develop projects without stepping on the toes of the sales teams.

Fusion Power's range of functionalities and apps in Podio now enable the business to leverage their ever-growing amount of data. These have enabled numerous key advances in Fusion Power's processes, including allowing designers to allocate equipment for a particular project while simultaneously updating the project's bill of materials and the company inventory—all automatically and simply with a few clicks of the mouse.

A financing 'workspace' in their Podio environment allows Fusion Power's accounts team to track jobs' true costs and profitability, while keeping sensitive financial data separated from wider access; while another app tracks project timestamps and other key events. "Based on those, we're now able to display KPIs throughout our whole organization," says Gallagher. "How long has this project existed? What are the timelines? How long did it take us to reach key milestones? The evolution has been amazing."

Evolution through automation

The development of different 'apps' and 'workspaces' in Podio has also enabled Fusion Power to automate a series of processes and build out new projects in Citrix Podio. Entering a sale now automatically creates an entry in the accounting and finance space, and a project in the design and engineering space. Citrix Podio then informs the respective departments that new projects are in their queue and ready to be actioned.

Automated processes also keep their customers informed and updated about key events in the order cycle. Instead of needing staff dedicated to constantly updating customers, if an engineer makes a change in Podio, it can trigger an automated process that will text or email the client, notify the account manager and sales rep, and set up the next series of processes. This not only simplifies communication internally but increases client satisfaction with immediate notifications on progress.

"When one person does something, automated processes update all the other spaces and create other items as needed. Using automation for consumer communication and updates was a huge thing for us," Gallagher notes. "When we started, we maybe had 14 automations; now we have close to 1,100. Citrix Podio creates calls to action, and with that you create a ton of efficiencies."

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Seamless document workflows to simplify sales

And while automation creates efficiencies across the business, Citrix Podio's integration with Citrix RightSignature is streamlining the sales journey end-to-end. Contracts are now automatically generated, sent to the customer for signature, and processed on completion. "Automated e-signatures with Citrix RightSignature have accelerated our sales process," says Gallagher. "You push a button, the customer signs the contract, it automatically gets uploaded to the project. It's a beautiful thing."

Gallagher now struggles to think of an area where Podio doesn't enable Fusion Power; the platform is integral to daily operations to the extent that being active on the platform is now a priority when new employees join the company. "The first thing HR does when onboarding new staff is create their email address," he notes. "The second is they create their Citrix Podio login."

Gallagher concludes: "Citrix Podio is our work truck. You pile stuff in and it gets the job done. It's enabled us to grow from a small sales dealership to a projected $50 million in sales this year. It's so capable, and "it's in every aspect of our business.""

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