

CASE STUDY

TriSMART Solar Increases Efficiency & Reliability with Enerflo



The Challenge

With 25 crews and more than 40 sales reps, TriSMART's previous platform became unreliable and time consuming. TriSMART's main bottleneck was in the proposal process; in addition to it not being visually appealing, reps were unable to execute new contracts consistently due to reliability issues with the platform.

Their previous platform required a lot of training and involved a complex process for reps to close a sale. TriSMART needed to move away from a third party providing production estimates into a platform where all data could be easily accessible, reliable, and accurate.

"Our old proposal tool had become so unreliable that our reps couldn't function. We couldn't get sales, which is obviously detrimental to the company."

Charles Heaton - VP of Sales, TriSMART



The Enerflo Solution

- ✓ Enerflo Sales Core
- ✓ Docflo Signing Packets & Contracting
- ✓ Optimus Proposals
- ✓ Lendflo Integrated Financing

Using their existing CRM, the team at TriSMART sought out a replacement to handle their proposals while integrating with a suite of other tools they use to manage their solar sales process.

After a vigorous review process, TriSMART chose Enerflo due to its ease of use and proprietary proposal solution, Optimus.

"It's just a beautiful proposal. It looks really good. It's very visually appealing and interactive," said TriSMART's VP of Sales, Charles Heaton. He continued, *"When your sales reps can't complete sales in the home, or your proposal isn't as visually appealing or as informational as somebody else's, your sales reps get frustrated because they can't sell with the proposal that you're providing them and they decide to go somewhere else."*

The team at Enerflo worked with TriSMART to integrate all data, including proposals, into TriSMART's existing CRM. Optimus required very little training for TriSMART reps and standardized TriSMART's sales and messaging for all reps.



About TriSMART Solar

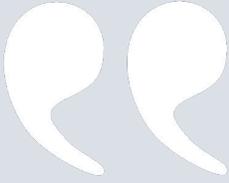
TriSMART Solar's rapid growth to more than 250 employees in the past 10 years is a testament to their emphasis on a seamless customer experience.

Offering residential and commercial solar, TriSMART is one of the largest solar providers in the state of Texas and most recently expanded with new locations in Phoenix, AZ and Hobbs, NM.

TriSMART operates as a hybrid company with an in-house sales organization for direct sales, while also acting as an EPC via a robust dealer network that handles solar installation.

Learn more about TriSMART Solar at: trismartsolar.com





Enerflo has been a phenomenal platform. I'm pretty familiar with everything else that's out there and in my opinion, Enerflo is one of the best.

It's accurate and helps you sell ethically and clearly, especially when your company is able to monitor the proposal production estimates."

Charles Heaton
VP of Sales, TriSMART



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The Results

157%

Increase in Leads

110%

Increase in Agreements

131%

Increase in Sold Revenue

TriSMART is big on transparency and wants to make solar less complicated for consumers while providing best-in-class tools for their reps. With Enerflo, TriSMART's process and data is now accurate, and the platform is reliable, enabling them to sell solar ethically, more clearly and efficiently.

Within one week, TriSMART was fully integrated with Enerflo and leveraging Optimus to increase sales using a unified message. All communications throughout the sales and install process were documented, connected, and easily viewable. Optimus significantly improved the overall sales experience and helped TriSMART achieve impressive growth, year over year.

About Enerflo

Enerflo is YOUR Solar Platform, purpose-built for Residential Solar Installers, EPCs, Roofers and Sales Dealers to deploy more solar through sales and business automation; ultimately lowering the cost of solar through platform efficiency. Installers rely on multiple tools from lead to install; Enerflo connects them all together in one, cohesive sales and install platform. Unlike other platforms, Enerflo is truly open, with the most integrations of any solar platform on the market, so installers and sales dealers can connect their favorite tools, refine their processes and provide a superior experience for solar buyers across the U.S. Enerflo is the backbone of some of the top solar providers, powering billions of dollars in sold revenue, and can be relied on to deliver one connected flow, from lead to PTO.

Book a Discovery Call with an Enerflo Platform Consultant to see if Enerflo is right for your solar business.

BOOK TIME NOW



VISIT [ENERFLO.COM](https://www.enerflo.com) TO LEARN MORE & BOOK A DEMO