

WHITE PAPER SERIES

Pathways to Higher Profitability: Field Service

Synchronize the Field and the Office With
Integrated Solar Solutions





Grab a seat and enjoy.
Read time: 8 minutes

Robust Solar Business Management Plus Field Service Data Drives Business Growth and Profitability

Installers Can Save Time, Increase Margins, and Better Manage Resources With A Comprehensive, Integrated Cloud-Based ERP and Field Service Solution Built Specifically To Meet Solar Industry Demands

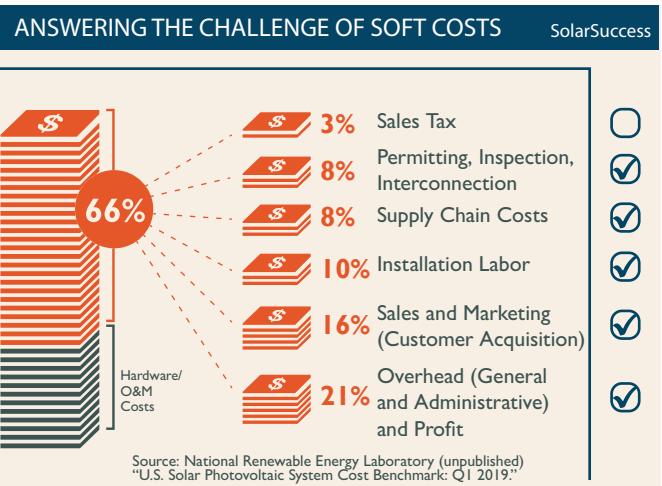
We see it time and again. Solar contractors using popular, single-purpose business applications start to shuttle data manually between programs. Eventually data gets siloed, out of sync, or lost altogether because programs don't share data or talk to each other.

The worst time to experience this cycle of doom is during growth periods when you're counting on process efficiency the most. You need more labor to manually update more data. Projects get delayed. Errors find a way into the data. Employees get frustrated. Customer experience suffers. Costs go up. Growth slows. Profitability declines.

To scale profitably, many installers replace applications like QuickBooks for accounting, Salesforce for CRM, and Job Nimbus for project management with integrated management solutions that support all the core business functions from a single data source.

Solar contractors in the US are poised for record growth, fueled by the \$1.2 trillion Bipartisan Infrastructure Framework passed by the Senate in early August 2021.¹ Already, solar grid connections have increased more than 20-fold since 2008, aided by hardware costs reductions and the US Investment Tax Credit.²

But growth is not guaranteed. While many contractors benefit from lower-cost hardware - solar panels, inverters, racking systems, etc., many have also struggled with soft costs accounting for intangible items required for solar installation and maintenance, including general and administrative costs, customer acquisition costs, permitting, supply chain costs, and field service operations costs. Soft costs represent about 66 percent of total installation costs,^{3,4} and reducing this is the solar installers' biggest opportunity to increase profitability. Throughout the project lifecycle, from customer acquisition to project handover, there are many opportunities to trim soft costs.



These operational issues can all stack up soft costs in your organization.

- Project management fumbles
- Changing customer acquisition costs
- Poor resource allocation and deployment in the field
- Missed first-time install/fix rate targets
- Mismanagement of inventories and purchases
- Missed milestone payments
- Unexpected “adder” costs
- Delayed and erroneous invoicing
- Inconsistent and late reconciliations
- Shifting tariff rules
- Poor adherence to regulatory and inspection requirements
- Incorrectly filed authority having jurisdiction (AHJ) applications

All in all, DOE estimates that solar soft costs can be reduced by \$1 per Watt.⁵

“You can’t just hit the off-switch on soft costs. It’s about looking at overall operations to find inefficiencies that can be addressed through integrated applications, process improvement, automation, training, and data standardization.”

Jan Rippingale, CEO at Blu Banyan, a California-based Oracle NetSuite Solution Provider and SuiteApp developer.

Integrated, Solar-optimized Solutions

Blu Banyan developed SolarSuccess, an application built on the NetSuite business management software platform, to help installers in all solar market segments reduce soft costs.

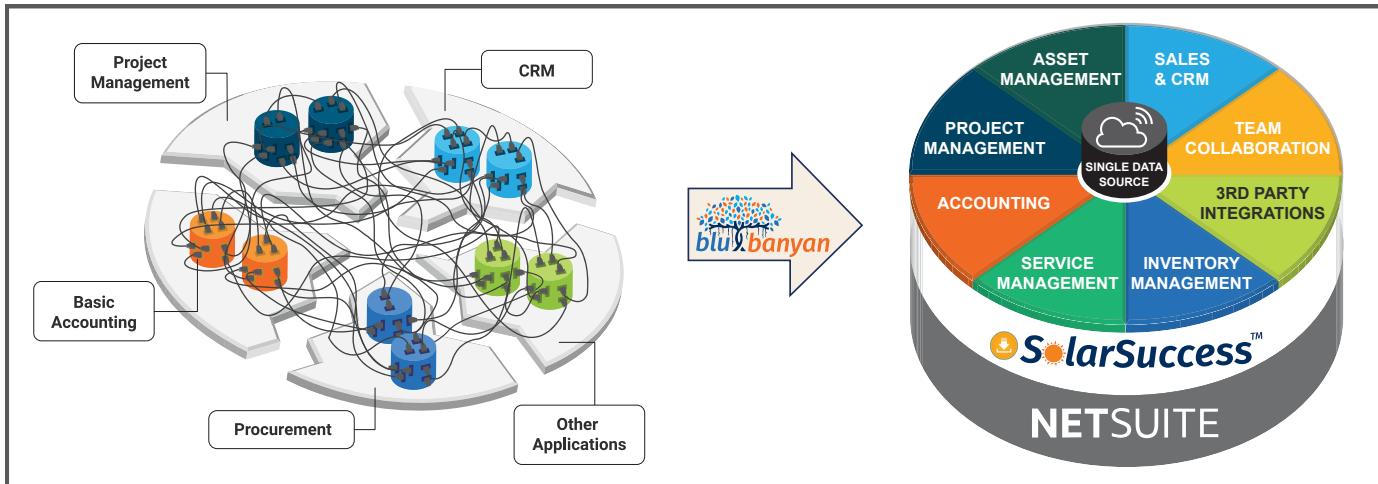
FieldAware, a field service SaaS company based in Texas, uses automation to reduce field service paperwork and streamline dispatch processes and travel schedules, reducing job duration and associated labor costs.

SolarSuccess is pre-integrated with FieldAware, enhancing the entire business suite from back-office to field operations. The integrated solutions extend the value of NetSuite to the field and expands visibility from any device across the full project lifecycle, past, present, and future.

The combined solution unifies processes across all projects and puts the technology focus where it matters most, synchronization of the office and the field. By leveraging the robust features and capabilities of NetSuite ERP, with SolarSuccess’ solar-optimized enhancements and FieldAware’s powerful mobile and web field service app, a solar installer can deliver high-impact results to customers and the company. All data is synced in real-time, accessible everywhere, by everyone from sales reps to field techs, and accountants to executives, all working from a single data source.

“Combining SolarSuccess with FieldAware offers solar installers a consistent, integrated platform that can be configured and expanded to meet the growing needs of solar installers as they encounter inevitable growing pains of rapid expansion.”

Marc Tatarsky, Senior Vice President of Marketing, FieldAware



"Our joint solution can flex and adapt to meet the needs of any sized solar installer whether they are early-stage growth organizations or mature regional/national installers that need more advanced enterprise-level capabilities."

Marc Tatarsky, SVP of Marketing,
FieldAware

An integrated solution provides a seamless, harmonized experience of a single source of data truth across all company operations. The entire business—sales pipeline management, CRM, accounting, purchasing, installation project management (including project costing and profitability), inventory and warehouse management, customer invoicing, universal financier connectivity, team collaboration, field service management and business intelligence—shares data from a single source.

Among the features:

- Real-time insight into key performance indicators (KPIs), project status, costs, profitability, inventory availability, and pricing
- Solar-specific dashboards, templates, Gantt charts, forms, and alerts to guide workers through customized workflows and regulatory checklists
- Advanced scheduling tools and dynamic assignment of all field resources and activities
- Visual timelines to plan and optimize multi-phase projects using project milestones that trigger accounting events
- Synchronization of project bills of materials (BOM) on sales orders
- Collection and archiving of photos and customer signatures from the field
- Offline task and work order management for remote field workers
- Rich team chat to optimize internal company and external guest communications

The benefits: reliable, real-time visibility over the full solar planning, installation, permitting and maintenance lifecycle.

“Growth can be a double-edge sword for unprepared companies. Having the right technology tools in place allows companies to scale smarter and meet the challenges faced by new and expanding demands.”

Jan Rippingale, CEO, Blu Banyan

“FieldAware for SolarSuccess provides the digital tools solar installers need to support and optimize their operations. An end-to-end field service management system brings the procedural rigor, and auditability solar installers need to adhere to industry regulations while creating automated, robust, photo-documented processes that are scalable. This one-two punch enables solar installers to win new business and demonstrate industry-leading service quality.”

Marc Tatarsky, SVP of Marketing, FieldAware

22% Increase in Customer Satisfaction

For a service business, every truck roll is expensive. FieldAware reduces the need for multiple visits by putting customer work history, asset tracking capabilities, and job documentation at the field engineer's fingertips. There is no need for stacks of paperwork, the back office can see the job status in real-time, and field engineers have everything they need right from their mobile device.

Implementing FieldAware by itself reduces operational overhead and fuel costs. SolarSuccess and FieldAware together unify all company operations, allowing for rapid and profitable growth.

When solar installers extend the power of SolarSuccess to field operations with FieldAware, they save time and money on labor and scheduling, while increasing customer satisfaction by over 22 percent.

Open Access AHJ Registry

The US has over 36,000 jurisdictions and 3,000 utilities, each with different rules and regulations for how to go solar, according to the US Department of Energy (DOE).³

Blu Banyan, in partnership with SunSpec Alliance, has created the open access AHJ Registry to advance data standards for renewable energy projects. The registry helps solar installers quickly identify which regulations apply to each jobsite. It removes confusion and guesswork by instantly providing a mapped polygon and regulatory contact information for any US address. The AHJ Registry is included with SolarSuccess and is accessible with FieldAware's mobile application, unifying the tools, processes and data needed from project bidding through successful completion.

“We aim to make life easier for all dispatchers and field teams, so you get more done every day by taking advantage of the newest technologies so you can focus on growing your business, not running your systems.”

Marc Tatarsky, SVP of Marketing, FieldAware



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¹ CNBC, Senate passes \$1 trillion bipartisan infrastructure bill..., (accessed August 12th, 2021)
<https://www.cnbc.com/2021/08/10/senate-to-pass-bipartisan-infrastructure-bill.html>

² Solar Energy Industries Association (SEIA), Solar Investment Tax Credit (ITC), (accessed June 2nd, 2021)
<https://www.seia.org/initiatives/solar-investment-tax-credit-itc>

³ US Department of Energy, Soft Cost Basics, (accessed May 3rd, 2021)
<https://www.energy.gov/eere/solar/solar-soft-costs-basics>

⁴ Solar Energy Industry Association, Solar Industry Research Data, (accessed June 2nd, 2021)
<https://www.seia.org/solar-industry-research-data>

⁵ Solar Energy Industries Association (SEIA), Solar Soft Costs Fact Sheet (accessed July 20, 2021)
<https://www.seia.org/sites/default/files/2019-05/Solar-Soft-Costs-Factsheet.pdf>