

**MAUZY**
HEATING • AIR • SOLAR

Mauzy Heating, Air and Solar



ABOUT CLIENTPOINT

Located in Carlsbad, CA, ClientPoint is a robust cloud-based sales collateral and proposal creation, tracking, and management system.

 ClientPoint.net
 888-972-7375

ABOUT THE CLIENT

Located in San Diego, CA, Mauzy Heating, Air, and Solar provides both residential and commercial HVAC and Solar energy services.

 mauzyhvac.com
 619-448-9545





Doubled sales from \$5.7 million in 2014 to \$11.4 million in 2015 using ClientPoint.

75% reduction in time spent creating proposals from 20 mins to less than 5 mins. Spending only 37 hrs per month compared to previously over 150 hrs.

THE SITUATION

To create business proposals, the sales team at Mauzy were using a 2-part NCR form that they would complete by handwriting the required information. They would then give the prospective client a copy of the mostly handwritten proposal.

The problems and frustrations caused by using this paper-based system to create and deliver business proposals were:

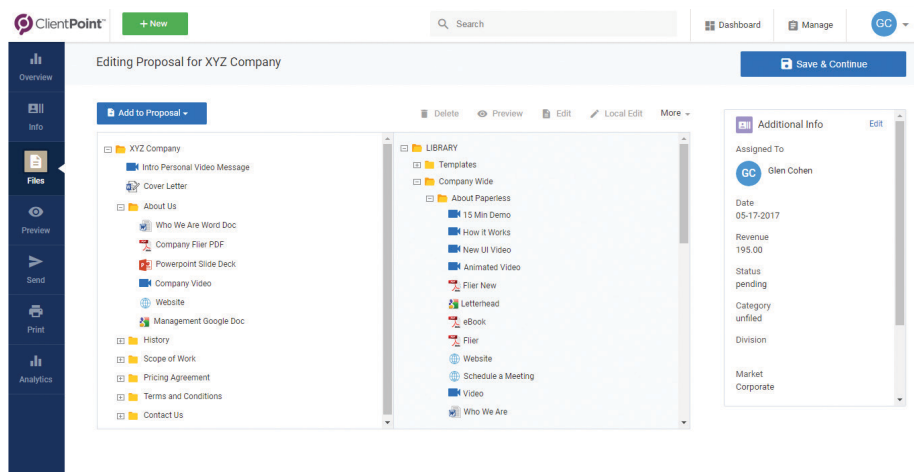
-  Creating proposals was **time consuming**. It took 20 minutes to complete a single proposal. Because they created their proposals in real-time in front of the prospect, the prospect had to wait while the salesperson created the proposal.
-  The proposals they created were **inconsistent and error-prone** due to being done manually.
-  Their business proposals **did not look professional**.
-  Their proposals were **difficult to track and manage** as they were not in an easily accessible, trackable, and manageable digital format.



Matt Mauzy decided that to remain competitive and grow his business, he needed to **modernize his system** for creating and managing sales materials and proposals.

THE SOLUTION

ClientPoint worked with Matt Mauzy and his team to build a proposal template that matched his business needs. Matt and his team were then trained on how to use the ClientPoint system to create, track, and manage all their business proposals.



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Their real-time proposal tracking system is great because it notifies us whenever a prospective client is looking at their proposal. This allows us to know that prospect is available so we can call them to answer any questions they may have. This feature alone has helped us win a higher percentage of new business.

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THE RESULT

- ✓ From 2014 to 2015, Mauzy Heating, Air, and Solar **increased sales** from \$5.7 million in 2014 to \$11.4 mil in 2015. Matt Mauzy credits much of their rapid growth to their ability to quickly create, track, and manage professional business proposals using ClientPoint software.
- ✓ The time it took for the Mauzy sales team to create and deliver a professional business proposal to a prospective client was cut to a fourth of what it was before. And this is critical because in their business, the faster you can provide a prospective client with a quality proposal, the higher the rate of **winning new business**.
- ✓ The Mauzy sales team prepares about 450 proposals per month. By **reducing the time** it takes to create a proposal from 20 minutes to less than 5 minutes, Mauzy's sales team now spends only 37 hours per month creating proposals compared to over 150 hours per month they spent when they created hand-written proposals.
- ✓ Because of the precise step-by-step business proposal creation system developed by ClientPoint, proposal data **errors were reduced** by over 95%.
- ✓ ClientPoint made Mauzy's business proposals look **much more professional** than the proposals of companies they were competing against. This helped them win a significantly higher percentage of new business.

ClientPoint provides great customer service and they work with me and my team to build new features into their software to help my business become more successful. My relationship with ClientPoint feels like a partnership.

Contact us to receive a free live consultation of ClientPoint software at 888-972-7375 or online at clientpoint.net



ClientPoint™