



## Overview

Textbook Painting, a company that specializes in exterior painting, chose Method:CRM as its cloud-based solution to better manage customer data and a seasonal team of college students. Taking advantage of Method's integration with QuickBooks and the platform's shared users, the Textbook Painting team has:

- Increased employee engagement by 30%
- Saved 20 hours a week in data entry, allowing them to re-allocate staff to customer service
- Strengthened its season marketing initiatives to nurture leads 23% faster

## The Challenge

Due to the seasonal nature of their business, owners Michael and David always needed to pay special attention to finances, marketing and staffing in order to make sure they were covered during off-seasons and prepared again for spring and summer.

Textbook Painting struggled with sending delayed quotes and invoices to customers. With Textbook Painting's field staff providing hand-written quotes and sending paperwork into the head office via fax or scan, data entry work would quickly pile up. "If you left the data entry task even for a few days, you would have a pile of 100 or so orders to enter," explained Michael.

To help organize and manage the data generated by field staff, Textbook Painting initially employed a dedicated admin resource; however, offering a day-to-day data entry position did not sit well with the owners who pride themselves on providing college students the opportunity to learn entrepreneurial skills. Additionally, mentoring and training a geographically diverse workforce, while maintaining top-notch customer service, was no easy feat.

Textbook Painting wanted to continue providing their staff with the experience of running their own small business during the summer months, which meant the company needed a system that accommodated quick training and adoption for a young sales force.

To achieve its objectives, the company required a cloud-based CRM system that would centralize customer information, eliminate unnecessary data entry, and featured a user-friendly interface. Additionally, the solution would need to offer subscription flexibility to accommodate the seasonality of their business.

## The Solution - Method:CRM Pro

"We dabbled with other CRM systems, but most CRMs that we looked at were complicated, intimidating, and hard to customize," remembered Michael. "Ease of use was paramount for us because we work with students and, for many of them, it would be their first time using a CRM -- it had to be simple and intuitive". Michael and the Textbook Painting team turned to Method for their intuitive, powerful, and highly-customizable CRM solution.

"Not only did we need a CRM, but we needed one that worked with QuickBooks - without it, we were back to our original double data entry problem," Michael noted. "During our free trial, I just loved being able to see how seamlessly the CRM worked with my QuickBooks -- it was so intuitive, you didn't have to tell the program to do anything".



**"...I just loved being able to see how seamlessly the CRM worked with QuickBooks..."**

*Michael Murray  
President, Textbook Painting*

As seasonal employers of college students, Textbook Painting has limited time to train their field staff, making it crucial for the company to create simple processes for collecting information and submitting orders.

"One of the features I really liked was how easy it was to customize the screens," Michael said. "We don't even take advantage of half of what Method offers, but the stripped-down version of Method that we chose to use makes training really easy."

## Business Benefits

With Method's shared user feature, Textbook Painting is able to manage their seasonal sales force, maintain an organized central database, and allow field staff the opportunity to access the system while keeping costs down. During off-peak seasons, Michael no longer has to shoulder the overhead needed to cover CRM access for 30 to 35 seasonal workers.

Less than 10% of Textbook Painting's sales occur during the initial estimate or consultation - the vast majority take place a week or so later. Using Method, Textbook Painting schedules weekly follow ups and stays top-of-mind with leads from season to season through targeted marketing campaigns, differentiating Textbook Painting in their competitive industry.

"Method's intuitive interface and powerful product allow us to identify prospects and develop marketing campaigns to help secure their business," concludes Michael. "I have recommended Method to entrepreneurial friends because when I use Method I feel much more in control of my business."

## About Textbook Painting

One summer while attending Miami University, Michael Murray and David Marker started a painting business to help pay for tuition and textbooks. They quickly realized they could offer local homeowners industry-leading prices, while giving fellow students hands-on experience in running a small business. Today, **Textbook Painting** specializes in exterior painting throughout the Midwest, and employs over 100 student painters each summer.

# method:CRM

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