

SUCCESS STORY

ServiceTitan Improves On-Time Project Delivery by 20% with Mavenlink



THE SERVICETITAN SUCCESS STORY

Championing the Home Services Industry

ServiceTitan is a field service software and mobile app company that supports residential HVAC, plumbing, electrical, and other home service businesses. Designed to be the one system needed to run an entire business, ServiceTitan works to improve sales, supercharge teams, and easily manage a home service business, both in the office and in the field.

ServiceTitan measures their success by the success of their customers and strives to create features in their software that enable continued customer satisfaction. These features include reporting, dispatching, scheduling, customer service, inventory, sales, and more. As a result, they have been honored as a Rising Star in Forbes Cloud100 Top Companies. ServiceTitan, backed by Bessemer Venture Partners, is trusted by more than 1,000 of the most successful home services companies. “We always ask how we can help our customers grow their businesses,” said Omar Al-Omar, Senior Manager of Customer Success Operations at ServiceTitan. “That, in turn, helps us grow ours.”

INDUSTRY

Software

COMPANY

ServiceTitan

SIZE

500+ employees

WHAT MAVENLINK REPLACED

LiquidPlanner, TeamGantt,
Microsoft Excel

BENEFITS

- Improved on-time project delivery by 20%
- Enabled highly productive team collaboration
- Increased visibility and rate of billable utilization
- Improved data accuracy and access

“ We started talking about how we didn’t have a way for everyone to collaborate. We also needed to have data at our fingertips and make it actionable. Mavenlink made both possible. ”

— OMAR AL-OMAR, SENIOR MANAGER, CUSTOMER SUCCESS OPERATIONS, SERVICETITAN

THE CHALLENGE

Improving Client Onboarding at Every Step

With a consistently growing user base of home service businesses depending on ServiceTitan’s software, client success operations play a crucial role in ensuring that customers are happy and that the ServiceTitan solution continues to grow and provide support in the ways they most need. Omar Al-Omar, Senior Manager of Customer Success Operations, knew that they needed to do something different to improve their processes, maintain growth, and keep customers satisfied.

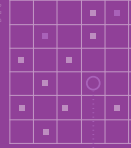
One of their first major initiatives was to find a project delivery solution for the onboarding team and stay true to their focus as a company. “We want to help our customers. And we continually ask ourselves how we can help them grow their businesses. That, in turn, helps ServiceTitan grow our business.”

However, ServiceTitan’s onboarding team did not have a dedicated solution. The data services team was using LiquidPlanner for data tasks and integration with JIRA while the enterprise onboarding team was using TeamGantt. These services could not speak to one another and, although LiquidPlanner was technically integrated with Salesforce, it did not streamline process. Additionally, ServiceTitan used

Excel spreadsheets to share important data. “It was difficult to make sense of our data. We couldn’t see how long it was taking us to get from phase one to phase two in the onboarding cycle.”

Due to these various systems being used independently of one another, ServiceTitan needed to overcome a couple key challenges:

- **Lack of Data Integrity.** Using different, siloed applications and the inability to pull pipeline data from Salesforce meant that ServiceTitan teams did not have access to comprehensive, reliable information regarding projects. This prevented employees from accessing historical data, knowing if open tasks were on track, and forecasting whether projects would be completed on time.
- **Dispersed Project Management.** Having teams using multiple pieces of software to complete their tasks meant that the project work was spread across many different solutions in an inconsistent manner. As a result, management did not have a clear view into project health and struggled to identify available resources when team members were out sick or project needs changed.



“The integrations made possible by Mavenlink were important. Salesforce and JIRA integrations were big for us because we needed to enable every single person to collaborate in a single space. With Mavenlink it’s very easy for everyone to collaborate, including our customers.”

— OMAR AL-OMAR, SENIOR MANAGER, CUSTOMER SUCCESS OPERATIONS, SERVICE TITAN

THE SWITCH TO MAVENLINK

Supporting Modern Collaboration

ServiceTitan’s Customer Success Operations Department was in need of a resource management solution that could integrate with their preexisting systems in ways that were not possible before, in order to gain the most value from their data and better serve customers. In addition, the software needed to supply a platform that united teams and enabled project managers with greater visibility into task progress. Doing so would allow them to make adjustments and improvements in ways that benefited both the team and ServiceTitan customers.

While ServiceTitan looked into using Workday and Clarizen, when they considered the process they were looking to drive, they found that neither was flexible enough. Because ServiceTitan commonly deals with many different projects and demands at the same time, they needed a solution that would help them manage multiple ongoing tasks simultaneously. These unique demands led them to Mavenlink to fulfill many different crucial needs, including:

- **Salesforce Integration.** Although Salesforce had been used to store large amounts of client data, Mavenlink enabled planning and delivery processes, and integration with other key systems. Being able to access and leverage data in ways that were impossible before was a deciding factor in choosing Mavenlink.
- **JIRA Integration.** With JIRA commonly used throughout ServiceTitan, the team needed a solution that could tightly integrate with JIRA and help the business run smoothly.
- **Team Collaboration.** After operating on many different incompatible and siloed systems, the new solution needed to allow everyone to collaborate in a single place for improved project management and greater employee productivity.

“Mavenlink’s MavenOps team was super helpful in asking the right questions and figuring out what we needed.”

FROM THE SOURCE

“We did a great deal of research ahead of time. We thought it would be hard for us to find something that works in every single way we need, but Mavenlink hit the mark.”

— Omar Al-Omar, Senior Manager, Customer Success Operations, ServiceTitan

“ In the past, we couldn’t tell if a project moved. Now, we can see when it was pushed and who it was pushed by, which helps us with our projected go-lives.”

— OMAR AL-OMAR, SENIOR MANAGER, CUSTOMER SUCCESS OPERATIONS, SERVICETITAN

THE RESULTS

Succeeding Through Actionable Data

Improved Forecasting Accuracy

Being able to forecast project progress and estimated completion dates has helped ServiceTitan’s customer success team plan accordingly, and effectively communicate with clients to improve their overall satisfaction. In addition, it has also helped hold project managers accountable for their assignments, which was previously difficult due to the lack of data and visibility. The insights enabled by Mavenlink adoption have helped ServiceTitan increase on-time project delivery by more than 20%.

Vastly Increased Data Quality

With data siloed in their respective systems and the inability to integrate with other vital project management software, data accuracy was “barely a guesstimate.” Now, with Mavenlink, including the integration with Jira, ServiceTitan has ready access to decisionable information. The company has been able to accurately determine team capacity, make informed hiring decisions, and reduce their project cycle times by acting on dependable data.

Project and Team Visibility

Mavenlink has given managers and administrators the ability to collaborate and find information as needed, with easy-to-view timekeeping reports playing a critical role in business processes. When combined with analytics, as well as time and administrative expense reports in Mavenlink Insights, data on employee work hours, PTO, and utilization is accurate and accessible.

Improved Company-Wide Processes

Today, ServiceTitan’s teams, from professional services to product management and customer success are coming together on Mavenlink to better collaborate, execute with greater precision, better serve clients, and drive improved company performance.

FROM THE SOURCE

“Mavenlink helped us improve our processes and eliminate tools that were not allowing us to collaborate.”

— Omar Al-Omar, Senior Manager, Customer Success Operations, ServiceTitan

