"In five minutes I can create a new field and start tracking something. In other businesses, that might mean a big programming effort to change the database."

Isola Homes Builds a Better World with Intuit QuickBase

Seattle-based Isola Homes needed a better way to manage all the deadlines, materials, and resources for the 130 construction projects it runs per year. Spreadsheets kept data in the dark, and building a custom database on Microsoft Access was too difficult and expensive. The solution was an application built on Intuit QuickBase that keeps company leaders up to speed and manages every key process of construction management.

The Challenge

- Sharing project and resource data across all departments was inefficient with spreadsheets and emails

- Lack of automated version control system made it difficult to know where each project stood

- No automated system for gathering and tracking signatures

- Custom databases too expensive and difficult to maintain

The Solution

- Intuit QuickBase apps for managing project information, inventory, and workflow

- Integration with DocuSign for simpler signature collection

- Integration with Exact Forms Plus for generating Microsoft Word and PDF reports

The Results

- Less administrative time spent tracking contracts and signatures

- Fast, easy access to property information for sales enablement

- Real-time access to centralized data improves communication and collaboration

- Integrations with DocuSign and Exact Forms Plus extend the value of the platform

Moving Beyond Spreadsheets

Isola Homes is a Seattle-based construction company that prides itself on the livability, quality, and efficiency of the sustainable homes it builds. A division of Isola Capital Management, Isola Homes is a multigenerational company that blends environmental stewardship with high standards of workmanship to create long-lasting customer relationships and long-term business success.

While the company was innovating on the construction side, its reliance on outdated productivity software was an issue that needed to be addressed. Project data was stored in hundreds of spreadsheets, making collaboration difficult and preventing true real-time access to project status and other key information. Employees never knew whether they were working from the latest and most up-to-date information.

With 40 employees managing the resources, materials and deadlines of 130 residential building projects per year, Isola Homes needed a better way to collaborate and share information related to the development, sale and management of each property.

"We had challenges with communication on Excel spreadsheets. If someone needed to figure out who owned a property and when it was going to be completed, it was difficult to keep all that information up to date across many different Excel files," says Colt Boehme, CEO of parent company Isola Capital Management.

An Integrated Solution

Boehme decided to replace the company's Excel spreadsheets with a database solution to manage and share construction data. Microsoft Access was too complicated to manage himself, and hiring a full-time developer was too expensive.

A web search led Boehme to Intuit QuickBase, which gave him the flexibility he needed to create an app that would meet his exact needs, plus the ease of use he needed to build, customize, and manage the software without any additional resources.

"I had some familiarity with QuickBooks, so it was easy to get started in QuickBase. We started by adding our inventory information and kept exploring different features to grow the app," says Boehme. "In five minutes I can create a new field and start tracking something. In other

Courtesy of Isola Homes

businesses, that might mean a big programming effort to change the database."

Isola Homes' QuickBase app now manages:

- Contracts with subcontractors, including e-signatures and deadlines
- Cost tracking, including comparisons of actual v. budgeted cost per project
- Specifications tracking for each project, from ducts to door knobs
- Vendor information, including contact information, accounting codes, and insurance information

The app also enables Isola Homes to streamline its document creation and signature tracking processes through an integrations with Exact Forms Plus and DocuSign. By consolidating paper-based processes into one web app that can be shared with clients and vendors, Isola Homes delivers a world class experience to everyone with whom it does business.

(See "The Partner Perspective" on page 4 to learn how Juiced Technologies, a QuickBase Solution Provider, was able to implement a seamless integrated platform for generating, managing, and tracking documents.)

Driving Value Back to Customers

Managing all construction-related data from a central source has tremendous benefits. Isola Homes has been able to ramp up both speed and quality, driving value back to its vendors, subcontractors, employees, and customers.

Getting property pricing reports to sales agents is faster and takes up fewer staff resources now that reports can be generated through Exact Forms Plus with a few simple keystrokes. Collecting signatures for contracts has shifted from a manual operation to an automated solution within DocuSign that can be completed in a fraction of the time and that makes it easy to see where information is incomplete.

And internal communications is improved, now that QuickBase provides real-time access to construction information in one location that employees can access anytime, anywhere — even on the road — with their computer or mobile device.

"We grew our app —one problem and one solution at a time — to a point where now everybody in the company uses it. It's what we use to track everything and to stay on the same page," says Boehme.

Juiced Technologies Helps Build an Integrated System

Isola Homes was still evaluating QuickBase during the free 30-day trial period when it recognized the need to extend QuickBase functionality to support its processes. Specifically, the company needed the ability to automatically generate documents from the data stored in QuickBase, such as subcontractor agreements, purchase orders, change orders, and contracts.

To build that capability, Isola Homes turned to Juiced Technologies, a QuickBase Solution Provider. Juiced first implemented [Exact Forms Plus](http://quickbase.intuit.com/partners/add-ons/exact-forms-plus), a QuickBase add-on the company developed that can generate Microsoft Word or PDF documents from QuickBase data.

To help Isola Homes streamline its approval mechanism for several processes, Juiced implemented an add-on called DocuSign for QuickBase. With this functionality in place, Isola Homes' clients and partners can review and sign documents electronically rather than printing, signing, and scanning or faxing them back to Isola Homes. The entire process can be tracked in QuickBase, so the Isola Homes team can see when each document was delivered, opened, and signed.

Juiced has continued to play an active role in Isola Homes' growth, not only through enhancements to the technology, but by coaching the Isola Homes team on best practices.

"Juiced really helped us get where we are now. They explained how everything worked, and enabled us to be self-sufficient in the future. Every time we need to take things to the next level and can't figure out how to do it ourselves, we go to them," says Katherine Carothers, System Analyst at Isola Homes.

Juiced says the relationship with Isola Homes had been a win for all sides.

"This project was a tremendous success," says Keith Jusas, CIO and owner, Juiced Technologies. "With these two add-ons working together, we were able to streamline what had been a very manual process at Isola Homes, while creating a DocuSign add-on service that is now available to all QuickBase customers."

About Intuit QuickBase
Intuit QuickBase is a low-code platform for building, customizing, and integrating custom business applications. With more than 5,600 customers and 500,000 active users, QuickBase is the technology of choice for companies that want to empower business users to solve their own challenges while maintaining the governance and security of an enterprise-quality app development system.