

## CASE STUDY

### How Forthright leveraged airSlate to help Closet Factory streamline their sales process and deliver a high-value customer experience

#### ABOUT CLOSET FACTORY

Closet Factory is a company that specializes in home organization and storage. They design and build out custom closets and storage spaces that add style, value, and efficiency to any home.

Closet Factory is a leading franchise with over 50 locations in the United States.

All the Closet Factory locations are individually owned and operated and can differ from one another. The Fort Lauderdale location happens to be one of the best performing locations in the country.

#### OVERVIEW

Closet Factory embarked on a digital transformation journey to enhance its sales processes and elevate customer experiences.

In this case study, we delve into how Closet Factory's Fort Lauderdale franchisee leveraged Forthright Technology Partners and airSlate, a comprehensive automation platform, to revolutionize its operations.

Driven by a vision to eliminate paper usage and enhance operational efficiency, Steve Newman, CEO of Closet Factory Fort Lauderdale, aimed to modernize the sales process.

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- Steve Newman, CEO of Closet Factory

## GOAL: A STREAMLINED, PAPERLESS PROCESS

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As one of the highest-selling Closet Factory stores, Steve Newman’s operation is often used as an example and a model for success. With that in mind, Steve and his team have lofty ambitions.

“One of our long-term goals is to eliminate paper in this business,” says Steve. “We are in 4,200 homes each year, that’s a lot of paper. We want to automate as much as possible, and be much more collaborative and efficient. With different departments all relying on paperwork, we need to have a centralized repository that allows everyone to have access in real-time, with no delays.”

To help them in their quest to go paperless, Steve and his team engaged with Forthright, who introduced airSlate to their workflow process. And they know others will be watching.

The Closet Factory in Fort Lauderdale found success with automation, which could be a catalyst for the entire Closet Factory organization adopting the solution to operate more efficiently across the board.



## THE CHALLENGE: TRIAL AND ERROR WHEN GOING DIGITAL

Although Closet Factory shines in delivering a personalized and high-value product, they lacked in being technologically advanced.

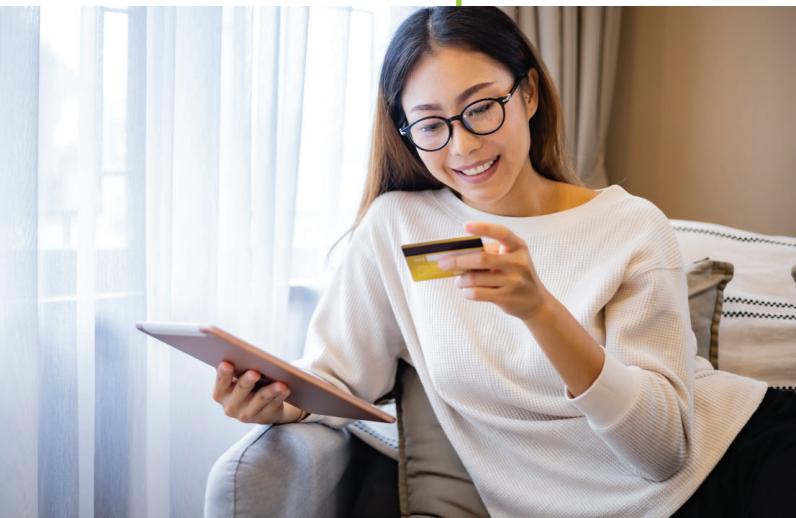
This was especially apparent when it came to the sales cycle, particularly at the point of sale. Understanding that there was a need to shorten the sales cycle in order to experience business growth, Steve sought the advice of Nizar Lavji, VP of Productivity & Collaboration Solutions at Forthright - Closet Factory's IT partner.

Based on their specific needs and the way the Closet Factory sales cycle works, Forthright suggested using airSlate to create digital contracts.

"We had previously worked with a third-party provider to build us a digital contract, which was essentially hard coding on someone's laptop that a customer could fill out," explains Alex Newman. "Unfortunately, we have certain if/thens - conditional logic - that add to our complex sales cycle that our initial digital contract could not solve for. Thanks to Forthright, we now have airSlate which meets our needs and has allowed us to do what we were hoping for."



In addition to working via conditional logic, Forthright has helped Closet Factory bring the contract and the digital design process together. Because everything Closet Factory produces is completely custom, clients have to approve every aspect of the design, which has historically been done through a third-party software, like AdobeSign. Aside from being a lengthy, complicated process for customers, it also meant that important signatures or details would not get captured.



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- Alex Newman, Closet Factory

## THE SOLUTION: AUTOMATING THE SALES PROCESS

“Forthright and airSlate have allowed us to compress the sales cycle and recover some losses that resulted from a disjointed process,” says Alex. “I’m no longer chasing people down to get a missing signature or make sure their payment is going through or hunting down a client I can’t get a hold of. Now, we get what we need the first time around.”

Working with Forthright has also helped keep the sales process compliant and hold both salespeople and clients alike accountable.

## THE RESULTS: USING AUTOMATION AS A PERFORMANCE MOTIVATOR

An interesting and unexpected way that Forthright and airSlate have brought value to the Closet Factory team is by giving them a means to performance-manage their staff.

“Our business is very personal and our sales people are often outside of the office interacting with clients, making it hard to see exactly what they’re doing,” explains Alex. “We can now audit our team and mitigate any shortcuts that may happen, which has been motivating. For example, if someone has a lower closing ratio, we can coach them through the process and help them become better at their job.”

Instead of being perceived as a sort of watchdog on them, the Closet Factory sales team has been grateful for the opportunity to develop their professional skills and focus on being more detail-oriented. Plus, the efficiency that Forthright has brought to their process means there are more deals to be made.

“We now have the ability to obtain certified signatures, versus having someone write their credit card number on a piece of paper,” explains Steve. “Certified signatures have been a big deal, not only for PCI compliance, but because they’ve also eliminated any he said/she said. If there’s something in a contract that we need to enforce, we have a check and balance system and a repository for all critical documentation, so we know who, what, where, why, and when anything transpired.”



With the majority of sales and design activity happening out in the field, access to WiFi can sometimes be an issue.

“The airSlate solution has been a good choice for us because we’ve been able to create an Offline Document that is not dependent on internet connectivity, but will still feed right into our central repository,” says Alex. “Our team can confidently go through their sales process without missing a beat, which makes their lives and jobs easier.”

**“With Forthright and airSlate, the sales cycle has been significantly shortened, by days or hours,” says Alex. “Our salespeople are ecstatic about that.”**

Since working with Forthright and implementing airSlate, the sales process has changed drastically for the folks over at Closet Factory, so much so that it's hard for them to pinpoint what they love most about the software. However, Steve and Alex are quick to mention two critical elements:

"When we're with a client who has approved a design and we're in airSlate going through the signature process, we are barred from moving the contract forward until all required fields are completed," says Alex. "This is vital; this is where a lot of errors or incompletes happened in the past. Requiring that each signature or initial is completed before hitting 'NEXT' alleviates the need to chase anyone down for more information. I can't overstate how important this is."

Steve adds, "airSlate has brought a level of professionalism to our process that shows our consumer that we really have our act together. It shows a much higher level of professionalism than our competitors. airSlate is sophisticated, and it gives our clients a higher level of confidence in our product."

As a bonus, having a digital contract makes it easy for anyone, anywhere to add their signature and move the process forward, which works out well since many of Closet Factory's customers live elsewhere or travel frequently.

**"Forthright and airSlate have just made everything much more seamless for us, which allows us to focus on how we can continue to grow and scale our business," says Steve.**



## SAVING TIME, MONEY, & PAPER

In the short time they've been working with Forthright, the Closet Factory team has already seen significant savings in time and money.

Most noticeably, the team no longer deals with the grief of chasing down customers or credit card numbers. They're able to get the signatures they need the first time around and run payment immediately, which results in a more efficient cash cycle for the company.

They are saving mountains of paper thanks to a seamless and streamlined digital process.

Moving forward, Steve and Alex and their Fort Lauderdale team are hopeful that their location can enact change across the entire Closet Factory organization.

**"We are operating in a very competitive environment," says Steve. "The more profitable we can be, the better. And Forthright and airSlate are helping us get there."**