

CASE STUDY

Six-month delivery and rapid time to value with Inoapps Evolve

CUSTOMER

Climate Pros

INDUSTRY

Professional Services

LOCATION

Chicago, Illinois, USA

CUSTOMER PROFILE

Founded in 2006, Climate Pros designs, builds and services refrigeration units across the United States. They serve over 1,300 customers across over 10,000 sites for the retail, warehousing, convenience store and biomedical sectors.

BUSINESS NEED

Climate Pros spent a decade developing and using their own systems to manage their Finance, Human Resources and Supply Chain operations. As they grew, they saw the need to move to commercial off-the-shelf software for Finance, and in 2016 started to implement SAGE. However, by the time they went live, they had outgrown what SAGE had to offer.

They continued to grow rapidly and needed a solution that could easily scale and support the flexibility their business now required. Something with more robust processes that could grow with them as they expanded into new business lines and regions. It also needed to work with their bespoke invoicing and the core, self-developed operations system that's key to their business.

Part of their growth came through acquisitions, and they had committed to their board to be on one Finance system by 2024. They needed to get up and running quickly and were looking for a partner who could deliver that and then continue to grow their capabilities.

OBJECTIVES

- ▶ Modernize finance operations with a new platform by 1 January 2024
- ▶ Lay foundations for future growth with firm data for decision making
- ▶ Support operational agility to respond to changing market forces
- ▶ Automate manual processes to free up staff for higher value work
- ▶ Adopt a system that could scale to easily incorporate acquisitions

SOLUTION

Climate Pros reached out to Oracle and Workday, and Oracle recommended Inoapps based on our proven industry expertise. Climate Pros selected Oracle when it became clear the Workday solution wouldn't flex to integrate the critical pre-existing systems.

With their need for speed, Climate Pros was attracted to the Inoapps Evolve rapid implementation approach. Inoapps Evolve harnesses Oracle Modern Best Practice for fast deployment of core capabilities to provide a solid foundation that can be built on over time.

Since Climate Pros was committed to a program of continuous improvement, Inoapps Evolve gave them what they needed to get up and running fast without needing to do a large single-deployment transformation project.

The contract was signed in just three months—an exceptionally short timeframe for this type of project.



OUTCOMES

The project kicked off in June 2023 and was delivered by the January 1st 2024 deadline.

It proved a real partnership. Inoapps clearly communicated deliverables and how the project would be run. Climate Pros understood the process from the beginning and could plan capacity accordingly to support a smooth project.

“The project went extremely well, and it was a real collaborative effort. Even elements like data migration were much more straightforward than we imagined, with nothing needing to be added manually. And go-live was so much smoother than expected—by day four on the system, we were ready to process our first payment.”

Alicia Schechter

Program Manager, Climate Pros

Climate Pros have very specific processes and knew the amount of work needed on their side, and the structured nature of Inoapps Evolve directed focus to key business requirements.

Inoapps seamlessly integrated the company's bespoke systems, including the business-critical invoicing system, and previously manual processes were automated.

PRODUCTS & SERVICES

Oracle SaaS Implementation service using the Inoapps Evolve rapid implementation approach

Products

- ▶ Oracle Cloud Enterprise Resource Planning (ERP)
- ▶ Oracle Enterprise Performance Management (EPM)
- ▶ Oracle Integration Cloud (OIC)

“I have been through several large implementations over my career, and this was by far the best with least amount of issues.”

Lisa Pieper

Director of Accounting, Climate Pros

CONTINUOUS IMPROVEMENT

Inoapps Evolve is ideal for businesses that want a quick implementation and have plans for the future. Continuous improvement is integral to the approach.

Two go-lives quickly followed the initial January 2024 delivery:

- ▶ **Oracle Enterprise Performance Management (EPM)** for data-driven decision making and online information sharing with branch managers
- ▶ **System expansion** to include Canada, with the addition of a foreign currency ledger

Effective knowledge transfer has empowered Climate Pros to take full ownership of their solutions. With Inoapps' assistance, business owners have upskilled themselves to get full value from their new applications.

We continue to work with Climate Pros on their ongoing enhancement program, and they have engaged Inoapps Managed Services to assist with their program of continuous improvement.

WHY INOAPPS?

Climate Pros was looking for a partner to grow their systems as they grow as an organization. Inoapps offers the breadth of services they need—from initial implementation requirements to expansions, managed services and continuous improvement.

Climate Pros selected Inoapps because they felt we'd be a good fit, and from start to finish we've seen that the relationships forged at all levels have been key to project success.

“Inoapps came with a perspective that could be put into practice to get us off the ground quickly and cost effectively. Inoapps Evolve gave us what we needed to start our transformation without all the complexity of a large-scale implementation. The controlled deliverables and set approach made the project feel manageable and less overwhelming.”

Alicia Schechter

Program Manager, Climate Pros

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