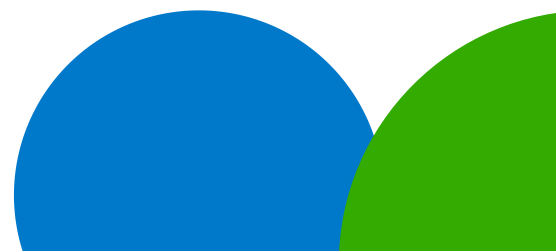# NEXUS

# CASE STUDY

*LOUVERSHOP*

# THE COMPANY

**LOUVER|SHOP**
SHUTTERS, BLINDS & SHADES

Louver Shop, incorporated over 50 years ago in 1972, is America's best source for high-quality, built-in-the-U.S. custom interior and exterior shutters and contemporary blinds, shades, and speciality window coverings for residential, commercial, and multi-family applications. They have an independent dealer network serving 22 states over the eastern area of the United States, producing their own line of shutters and other brand name blinds and shades through turnkey design, installation and after-sale service to all customers.

Louver Shop shutters have become the measure for excellence and ingenuity with many proprietary processes and patented features, and a lifetime warranty on moving elements, craftsmanship and painted finish on their products.

Clearly, in order to thrive for over 5 decades Louver Shop recognise the benefits of, and invest heavily in the modern technology and automation processes while balancing this perfectly with individual customer service.

# WHY NEXUS?

"From the very first conversation, it was clear to us that the team at Nexus had a lot of experience with integrating client's own systems and processes with Keap, which we use as our marketing CRM.
They quickly understood our business requirements and were able to offer solutions and processes that have made a tangible difference to our efficiency.".

# THE PROBLEM

As a long-term manufacturer, supplier and distributor Louver Shop already have a well-established base of personal and corporate customers. However, one area that had evolved faster than their current in-house systems had catered for was in marketing.

Louver Shop had already built an infrastructure within Keap for their marketing journeys – everything from initial enquiry through to installation and post installation reviews.

The problem was that the initial "input" into this process – which was getting data from their current in-house database and into Keap – relied upon manual data extraction, tweaking/correcting the data extract within Excel and then uploading a data file into Keap and thereafter manually tagging records within Keap to kick start the marketing automation.

# THE PROMBLEM

Furthermore, during the life of the customer journey, the marketing department would need to go into Keap and manually tag/update customer records.

As already mentioned, Louver Shop have always invested in their systems and processes and a project was already underway within the company for a new in-house CRM and telephony system which would ultimately need to feed into Keap.

This means that there were 2 problems that needed to be addressed:

Provide a "quick win" method to remove manual data manipulation of the initial data extract and remove the manual process of uploading and tagging records within Keap

Create a process that could quickly and easily be called by their new CRM and telephone system to ensure that the in-house CRM and Keap database were in complete synchronisation without the need for the in-house development team to go through the process of Keap integration development.

# KEY CRITERIA

## 🗄️✓ DATA INTEGRITY

Data Integrity – when dealing with client information across different platforms, it is imperative that the data is used and manipulated without any compromise. Not only from a data protection standpoint, but moreover from a customer reputation perspective.

## 👆 SIMPLE

Simple – the solutions needed to be simple, with as little involvement required as possible from both the operational staff and the in-house development team.

## 📊 AUDITABLE

Auditable – in any situation where data is passed from one system to another there is always a risk of something not working as intended. Given that many of the actions within Keap would drive a communication of some sort to the customer, it was imperative that full traceability and visibility of automated actions were recorded.

## ⚙️ EFFICIENCY

Efficiency – there is no point in investing in technology if it creates more problems than it solves. The designed solution would need to ensure that as fewer touch points as possible from team members was required.

# OUR SOLUTION

The answer to the problem was Nexus. Nexus is a set of middleware APIs and simple interfaces that exist purely to facilitate the interaction between different systems ... in this case, between an in-house CRM and Keap.

Keap is an exceptionally powerful tool for implementing marketing and communication journeys, but it is not known for being the most intuitive platform that has ever existed. Fortunately, Louver Shop has a lot of experience with the platform, and they know what it is capable of and over the years have found manual workarounds for most of its idiosyncrasies.

Looking at each problem in turn, we firstly created a very simple to use portal that removed the need for any manual manipulation of the old in-house database extracts.

This portal provided screens where lookup values, key to the manual manipulation of the database extract, could be quickly and simply managed. We coupled that with a file upload process that allowed the user to upload the database extract and press one button to replicate their previous manual process ... what could take a couple of hours a day, was literally reduced to a couple of minutes.

# OUR SOLUTION

The second issue was providing a way for the new in-house CRM that was being built (to replace the old database) to maintain the data within Keap and thereby ensure data integrity.

Talking to the in-house development team and the 3rd party telephony company we established a set of touch points that would be needed for the new CRM to "tell" Keap that something had happened, be that a new online enquiry or a change in status on the customer's order.

We then created a set of middleware APIs that could easily be called by the in-house CRM. The Nexus engine would then perform the necessary data manipulations, integrity checks and then synchronise with Keap. By using Nexus, the overall development cost and timescale for Louver Shop to integrate their new CRM into Keap was significantly reduced.
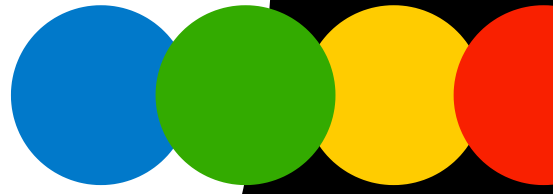
# FINAL WORDS FROM THE CLIENT

We shall leave it up to Lesli, who has been the point person (and had the most pain on a day-to-day basis) to sum up the effect Nexus has had:

**"Great news! ... This is HUGE and such a time-saver!"**

# NEXUS

**INTELLIGENT MIDDLEWARE FOR YOUR BUSINESS**

# CONTACT US

For an obligation free discussion on how we can integrate your business systems for seamless processes and high efficiency!

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