



O'NEAL
THE BUSINESS OF PROJECT DELIVERY

Website

www.onealinc.com

Industry Vertical

Engineering, Procurement, and Construction

Solutions

TrebleHook
Training
Support



O'Neal, Inc. Boosts Business with TrebleHook, TPM's Intuitive CRM Solution

About O'Neal, Inc.

O'Neal is a 250 person, employee-owned planning, design, and construction firm in The Business of Project Delivery – integrating overall project planning, design, procurement, and construction to create cost-effective capital solutions. O'Neal delivers complex capital projects for industrial clients in four major industry groups and has offices in Greenville, SC, Allentown, PA, and Atlanta, GA.

In this Customer Story, we meet John Baker, the Director of Marketing at O'Neal, Inc., who shares their journey in finding a transformative solution to their business challenges.

Challenges with Previous System

Before adopting TrebleHook, O'Neal had been using Cosential for four to five years, but they were facing significant challenges. The data in the system was outdated and limited in its value, leading to poor user adoption and frustrated teams.

Trying to get meaningful forecasting and reporting out of the system felt like “pulling teeth.” The highly mobile teams across multiple divisions and locations found it cumbersome to use a solution that didn't fit their needs. It was clear that they needed a change to extract more value from their software.

How O'Neal Benefited from TrebleHook

Fortunately, O'Neal had an existing relationship with TPM, the sister company to TrebleHook, and discovered their new solution, TrebleHook.

After an initial demo, it became evident that TrebleHook offered a more intuitive and straightforward approach to accomplishing their goals. The teams were impressed with its user-friendliness and ability to collect, project, and analyze information effectively. This positive feedback led O'Neal to roll out TrebleHook to their Business Development, Marketing, and Executive teams.

One of the standout benefits O'Neal experienced with TrebleHook

was the impressive dashboarding and reporting capabilities. The homepage dashboard provided easy-to-understand graphical representations of key performance indicators, allowing better insight into their progress. This helped other members of the organization understand where they stood in crucial areas without any complex database management.

With TrebleHook's automation and user-friendly interface, O'Neal no longer had to manually input data for their users or manage reports. This saved valuable time and made the solution accessible to everyone within the organization. The ease of use and flexibility made TrebleHook a valuable tool for O'Neal's marketing and business development professionals. They now had a solution that could grow alongside their business in the long term.

Experience Working with TrebleHook Team

The implementation and rollout of TrebleHook were smooth and logical. The Zero-to-Go Live in 30 Days or Less promise held true, and the process felt right on track throughout. Even for someone like John, who wasn't a database expert, the simplicity of the rollout process was reassuring.

The TrebleHook team played a crucial role in ensuring a successful adoption. They conducted 3 to 4 user adoption sessions, offering expert guidance and addressing user questions, which proved invaluable during the transition. The support provided by the TrebleHook team was exceptional, and their proactive communication ensured that O'Neal met their goals smoothly.

Overall, O'Neal's experience with TrebleHook has been transformative. The solution's user-friendliness, automation, and insightful reporting have helped O'Neal's teams focus on their core responsibilities without being bogged down by cumbersome data management. With the exceptional support from the TrebleHook team, O'Neal is confident that their partnership will continue to thrive, benefiting their business well into the future. exemplify how collaboration and support can transform businesses and forge bonds that stand the test of time.

"It (TrebleHook) gets down to the essentials of what we have to be able to do to collect, project and analyze information"

John Baker
Director of Marketing, O'Neal, Inc.

