

# COACHING CASE STUDY

FEATURING



*“OUR 30-YEAR-OLD FAMILY-RUN BUSINESS WAS BEHIND THE TIMES IN A BIG WAY. WITH JIM’S HELP, WE WERE ABLE TO INCREASE EFFICIENCY WITH A COMPUTERIZED SYSTEM, IMPROVE OUR COMMUNICATION AND OFFICE MORALE WITH “MORNING HUDDLES,” AND MARKET MORE EFFECTIVELY TO OUR TARGET AUDIENCE.” – SIMON HARPER, BUD MATTHEWS SERVICE, INC.*

## COMPANY BACKGROUND

Bud Matthews Service, Inc. is a home services company that handles HVAC systems, plumbing systems, appliances and construction needs. For more than 30 years, Bud Matthews Service, Inc. has been a family-owned business. In the beginning, it was a home-based business; today it has grown to a full-time staff in a professional office with half a dozen installers.

## BUSINESS CHALLENGES

Although Bud Matthews Service’s customer base steadily grew by leaps and bounds, the managing and marketing sides of the business weren’t able to keep up. The company’s operating systems were out-of-date. Nothing was computerized; everything was filed and written by hand. They had no targeted marketing plan and no reliable way to grow the business.

While being in business for so long is a good thing – obviously they are doing something right – it can also create tunnel vision for the team. “We end up doing things because they’ve always been done that way, instead of really examining if they’re the best choice,” said Simon. In those situations, it’s easy to miss the forest for the trees.

“Our company needed an outside perspective, a third party to look objectively at what we were doing and see the things we didn’t.”

## JIM'S SOLUTION AND RESULTS

"We were interested in Jim Jubelirer as a business coach because we thought he had the advice and experience to really help us. Bud brought him in, and almost immediately we started noticing changes that made a big difference," said Simon.

The most significant change Jim implemented was a computerized dispatch system, streamlining communications with technicians on the road.

Jim also implemented a new tradition called "the morning huddle." At the start of each day, Bud Matthews Services has a company-wide meeting to discuss their plans, share news and updates, and review the service calendar for the day. "It's only twenty minutes long, but it's made a huge difference in organization and morale," said Simon.

On the marketing side, Jim helped Bud Matthews Services start a client newsletter; in fact, their first email blast went out to 1,300 people. They've also gathered and analyzed feedback from all their service calls in order to continually improve what they do and how they do it.

"I've got an interesting perspective here –as an employee, not a business owner. And from where I stand, I can say that Jim is an honest, diligent individual with a sense of humor. As long as we stay the course he's set us on, I'm sure the business will continue to thrive." – Simon Harper, Bud Matthews Service, Inc.



**Find your WHY and create a long-range plan for your business with predictable results.**  
Contact Jim to get started.

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