



Transforming Service Operations: A Facilities Management Case Study

Facilities Management Sector



The Background Story

When a successful facilities maintenance company engaged Fileroom to deliver a new integrated HubSpot and Aircall solution to enhance their Simpro field service platform, they were managing one of the most complex operational challenges: coordinating thousands of qualified trade service providers across multiple states while maintaining rigorous compliance, safety, and quality standards. Having grown from a small regional operation into a national network over nearly two decades, their systems hadn't evolved to support their operational complexity.

Our team's initial assessment revealed a critical technology landscape challenge. The company was operating with an aging contractor management platform that couldn't effectively integrate with their Simpro ERP system used for job scheduling, quoting, orders, and invoicing. This disconnection meant that valuable contractor compliance data, project history, and operational insights were trapped in separate systems, creating operational blind spots and manual workarounds.

Despite having built substantial operational expertise over nearly two decades with zero major safety incidents, the company was forced to rely on manual processes to bridge the gap between their custom-built, legacy contractor management system and their Simpro operations. This led to inefficient data handoffs, compliance tracking challenges, and an inability to leverage their comprehensive operational data for strategic decision-making.

The Challenges?

The Fileroom team recognized this as an opportunity to demonstrate how our expertise in Integrated technology ecosystems could revolutionize their operations. By introducing a unified HubSpot platform with seamless and direct Simpro integration and Aircall connected conversational intelligence, we were confident we could build a seamless operational ecosystem to eliminate data silos, set a foundation for leveraging AI, and solve the following key challenges:

- **Fragmented systems preventing operational visibility**
- **Manual processes, rework and lost insights**
- **Compliance data trapped in disconnected platforms**



The Service Landscape

Having worked closely with facilities management leaders across industrial sectors, we understood the unique operational pressures our client faced. Managing integrated facilities services isn't just about coordinating trade partners, it's about maintaining rigorous safety standards, ensuring compliance across multiple jurisdictions, and delivering consistent quality while scaling operations nationally.

When we sat down with the leadership team, their operational challenges were immediately clear. The disconnect between their contractor database and Simpro platform was creating significant operational friction. Service coordinators couldn't easily access contractor compliance status when assigning jobs in Simpro, and project insights from Simpro weren't feeding back into contractor performance tracking inside the contractor management system.

We identified several critical operational pain points:

- **System Integration Gaps:** Their legacy contractor database and Simpro operated in silos, requiring manual data transfer and creating opportunities for errors and compliance oversights.
- **Operational Data Silos:** Critical contractor compliance information wasn't readily accessible during project planning and contractor assignment in Simpro, leading to inefficient workflows and potential risk exposure.
- **Manual Compliance Tracking:** With contractor data in one system and client project data in Simpro, compliance monitoring required manual cross-referencing across systems, consuming valuable operational time and creating compliance risks.
- **Limited Communication Integration:** Without unified communication tools, conversations and coordination between contractors, clients, and internal teams required multiple platforms, reducing operational efficiency and creating communication gaps.
- **Scalability Constraints:** The manual processes required to manage data across disconnected systems were preventing the operations team from efficiently scaling their contractor network and service delivery capabilities.

“Our operations team has the experience and processes to deliver exceptional service, but disconnected systems were slowing us down – compliance data lived in one place, while project insights lived in another.”



Business Objectives

Working closely with the company's operations stakeholders, we aligned on five core objectives that would transform their service operations:

- **Create a Unified Operational Ecosystem:** By rebuilding their contractor trades database within HubSpot and integrating it seamlessly with Simpro, we aimed to eliminate data silos and create real-time operational visibility across all systems.
- **Enable Integrated Communication:** Through Aircall integration with the unified HubSpot-Simpro ecosystem, we would create connected customer intelligence that turns every conversation into measurable business insight while maintaining communication history across all touchpoints.
- **Automate Compliance Workflows:** By centralizing contractor compliance data in HubSpot with automated monitoring and alerts, we would ensure 100% compliance visibility while reducing manual oversight requirements.
- **Preserve Operational Data and History:** Our migration approach would ensure that valuable contractor relationships, compliance records, and operational history built over 19 years would be preserved and enhanced within the new integrated ecosystem.
- **Build Scalable Growth Foundation:** The integrated HubSpot-Simpro-Aircall ecosystem would establish scalable processes that support continued national expansion while maintaining their perfect safety record and operational excellence.

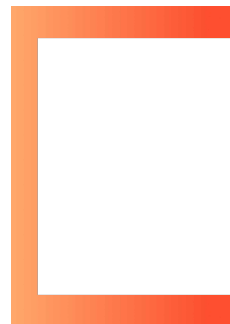


Pain Points

The company's operational challenges stemmed from system fragmentation:

- **Legacy System Limitations:** The outdated, old-technology contractor management platform couldn't integrate with Simpro, resulting in operational inefficiencies and creating barriers to unified data visibility across their service delivery process.
- **Manual Process Dependencies:** Operations coordinators were continuously managing data transfer between systems manually, preventing them from focusing on strategic operational improvements and creating opportunities for errors.
- **Fragmented Communication Systems:** Without integrated communication tools, customer conversations, contractor communications, and project coordination were happening across multiple platforms with no central intelligence or history tracking.
- **Compliance Visibility Gaps:** Critical contractor compliance information was locked in the contractor database while project assignments were managed in Simpro, creating potential compliance risks and requiring manual verification processes.

These challenges supported the need for a comprehensive technology integration strategy that would unify their operational systems while preserving their valuable contractor relationships and compliance data built over nearly two decades.



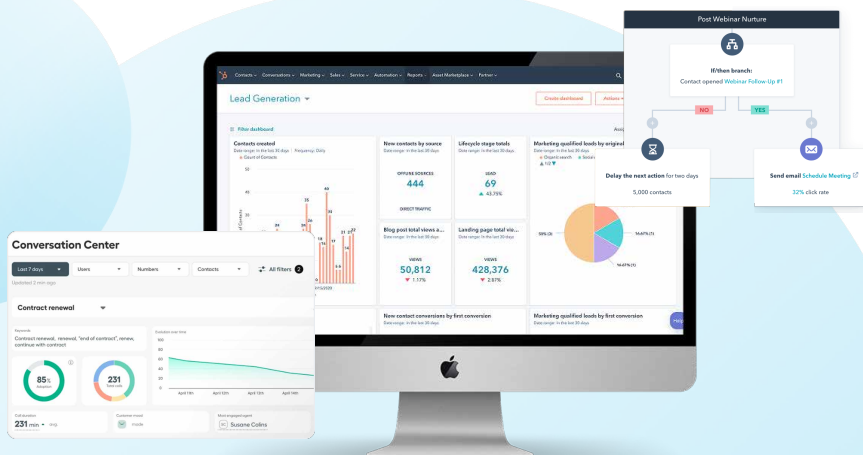
The Transformation Journey

Our partnership began with comprehensive discovery sessions alongside the company's operations, compliance, and IT teams. Rather than imposing a solution, we invested time in understanding their existing workflows, data relationships, and integration requirements between core systems, Simpro, and their communication systems.

This collaborative approach led to a comprehensive three-phase ecosystem transformation:

- **Rebuilding the Contractor Management System Within HubSpot:** We migrated the entire contractor database from Archie into a purpose-built HubSpot ecosystem, transforming client records, along with more than 6,000 subcontractor companies, and over 9,000 individual contractor employees into an integrated platform. We created four custom objects – Accreditations, Compliance Records, Insurance Records, and Trade Licenses – with proper association rules to maintain all existing relationships while enabling Advanced automation and reporting capabilities.
- **Integrating HubSpot with Simpro:** By establishing seamless integration between the new HubSpot contractor management system and the existing Simpro environment, we created unified operational visibility. Now, when projects are scheduled in Simpro, contractor compliance status from HubSpot is automatically accessible, and project completion data flows back to update contractor performance records.
- **Connecting Aircall for Complete Communication Intelligence:** Through Aircall integration, we enabled AI-powered conversational intelligence that connects customer communications with both contractor records in HubSpot and project data in Simpro. Every customer conversation now generates measurable business intelligence while maintaining complete communication history across all touchpoints.
- **Implementing Automated Compliance Workflows:** We built intelligent automation that monitors contractor certifications, triggers renewal notifications, and updates compliance status in real-time. This ensures that when contractors are assigned to projects in Simpro, their compliance status is current and verified, maintaining our client's perfect safety record.

The project wasn't just a system migration; it was a comprehensive transformation of our client's operational ecosystem. By connecting HubSpot, Simpro, and Aircall into a unified platform, we helped create an integrated operational environment that amplifies rather than constrains their service delivery capabilities.



Measurable Business Impact

- **Unified Operational Ecosystem:** The complete integration of contractor management (rebuilt in HubSpot), project delivery (Simpro), and customer communication (Aircall) created seamless operational workflows that eliminated manual data transfer and provided real-time visibility across all systems.
- **Preserved and Enhanced Operational History:** All valuable contractor relationships, compliance records, and operational data from the legacy system were successfully migrated and enhanced within HubSpot, ensuring no loss of institutional knowledge while enabling advanced automation and reporting capabilities.
- **Automated Compliance Monitoring:** Real-time compliance tracking with automated renewal notifications and status updates ensure contractors are always project-ready while maintaining industry-leading safety standards with zero manual oversight gaps.
- **Connected Customer Intelligence:** Through Aircall integration, every customer conversation is now connected to both contractor records and project history, creating comprehensive business intelligence that informs strategic decision-making and enhances service delivery. Also, enhanced by embedded AI, access to key information is fast and simple through strategic context prompting.
- **Scalable Growth Infrastructure:** The integrated HubSpot–Simpro–Aircall ecosystem provides the technological foundation for continued national expansion, enabling our client's team to efficiently onboard new contractors, manage complex compliance requirements across different facilities and sectors, and deliver consistent service quality as they scale.

But the most significant outcome was the transformation of our client's operational culture. Their team shifted from managing fragmented systems to leveraging unified operational intelligence, setting the foundation for growth while maintaining their commitment to safety excellence and community support.

Executive Insights

The transformation journey fundamentally changed how the company approached operational technology. What began as a need to replace an aging contractor management system evolved into a complete integration of their operational ecosystem, connecting contractor management, project delivery, and customer communication into a unified platform that amplifies their service capabilities.

As the Company's Leadership Team noted:

“The integrated ecosystem we now operate demonstrates what's possible when operational systems work together rather than in isolation. Our team can focus on delivering exceptional customer service while the integrated technology handles compliance monitoring, communication tracking, and operational coordination automatically.

Our partnership with Fileroom demonstrates what's possible when service organizations embrace integrated technology ecosystems while maintaining their focus on safety, quality, and support.”

For facilities management companies still struggling with fragmented systems and manual processes, there's a proven path forward with the Simpro, HubSpot and Aircall ecosystem – one that unifies rather than complicates operational workflows.

Checklist for Service Operations Leaders Considering Digital Transformation

Based on our experience partnering with facilities management organizations, we've identified several key factors that can make or break an operational transformation initiative:

- 1 Start with System Integration, Not Replacement:** The most successful transformations focus on connecting existing valuable systems rather than wholesale replacement. Understand how your current platform, like Simpro, can be enhanced through integration before making the decision to replace it.
- 2 Preserve Operational History During Migration:** Ensure that valuable contractor relationships, compliance records, and operational data built over the years are properly migrated and enhanced, not lost in the transition to new systems.
- 3 Think Ecosystem, Not Individual Tools:** Rather than selecting point solutions, prioritize platforms that integrate seamlessly. A unified HubSpot–Simpro–Aircall ecosystem delivers more value than disconnected best-of-breed tools.
- 4 Invest in Data Quality and Structure Early:** Clean, well-structured contractor and compliance data is the foundation of any integrated ecosystem. Ensure your data migration includes proper cleansing, standardization, and relationship mapping.
- 5 Build for Compliance Automation:** Manual compliance tracking doesn't scale. Build automated workflows that monitor certifications, trigger contract renewals, and ensure project assignments always use compliant contractors.
- 6 Plan for Continuous Enhancement:** Integrated ecosystems enable continuous improvement. Build in regular reviews to optimize workflows, add new integrations, build customer and supplier portals, and enhance automation as your operational requirements evolve.

Remember, operational transformation isn't about replacing human expertise, it's about creating integrated systems that amplify your team's capabilities while maintaining the highest standards of safety, quality, and service delivery.

If you're interested in knowing more about the specific outcomes.

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