

From Surfboards to Operational Excellence: How INNERGY Transformed Taber Company's Future

Executive Summary

Brian Taber started his career sanding doors in a small cabinet shop in Santa Ana, California. Today, he leads Taber Company, a \$44 million custom millwork business with 330 employees, known for its precision and operational excellence. This case study explores how INNERGY's ERP software and executive education programs enabled Taber Company to streamline processes, gain critical visibility into operations, and drive profitability. By embracing INNERGY's solutions, Taber Company transitioned from manually managing operations with spreadsheets to becoming a data-driven enterprise prepared for future growth.

Background: A Passion for Woodworking

Taber Company's story began in 2002, when Brian Taber's passion for woodworking and drive to create something of his own led him to start a business. After spending years working in small cabinet shops, learning everything from sanding to project management, Brian combined his hands-on expertise with a desire to build a company that reflected his values.

"I didn't have the means to go away to college," Brian recalls. "I started working in a cabinet shop because I loved woodworking in high school. Over time, I worked my way up, learning every part of the process." With a supportive family and a vision for growth, Brian co-founded Taber Company, initially running operations with Word documents and Excel spreadsheets. The company's first year in business generated an impressive \$3 million in revenue. However, as the company grew, the limitations of its makeshift systems became apparent. By 2020, Taber Company was generating \$40 million annually, but the lack of comprehensive operational tools led to inefficiencies, financial blind spots, and challenges in responding to market demands.

The Challenge: Scaling Without Visibility

For nearly two decades, Taber Company relied on manually updated spreadsheets and word processing tools to manage its operations. As the company's revenue grew, so did the complexity of its projects and the demands of its clients and financial partners.

- **Lack of job costing visibility:** The company couldn't easily track profitability on individual projects.
- **Inefficient inventory management:** Materials were hard to locate, and inventory levels were inconsistent.
- **No forecasting capabilities:** The team couldn't predict workload or capacity, leading to scheduling bottlenecks and inefficiencies.
- **Limited financial reporting:** Banks demanded detailed financial reports, but the company struggled to provide accurate and timely data.

"Before INNERGY, if someone asked where a sheet of material was, we didn't know," Brian explains. "We didn't know how busy we were going to be or even why we made or lost money on a job."

The Solution: Comprehensive Transformation with INNERGY



Recognizing the need for change, Brian turned to INNERGY's ERP software and educational programs in 2020. INNERGY provided more than just a tool; it offered a framework for rethinking how Taber Company operated.

Implementation

Brian and his team began by focusing on one department at a time, starting with estimating—the foundation of any project.

“We wanted to ensure the accuracy of our estimates before moving forward,” Brian recalls. “Previously, we used linear footage or square footage to price jobs, which was inefficient and often inaccurate. With INNERGY, we developed consistent pricing models and shifted to a data-driven approach.”

The transition wasn't without challenges. Early in the process, Brian's team had to replace their original implementation champion, delaying progress. However, once the right team member was in place, the company gained momentum, rolling out INNERGY's solutions across estimating, engineering, purchasing, project management, and financial reporting.

Key Results

INNERGY's software has fundamentally changed how Taber Company operates:

- **Enhanced job costing:** The team now understands project profitability down to the hour, enabling better decision-making.
- **Improved inventory management:** Materials are tracked with precision, reducing waste and increasing efficiency.
- **Capacity planning:** By using INNERGY's bottleneck reports, the company can flatten workload spikes, such as redistributing a \$6 million January workload across December and February.
- **Profitability growth:** Taber Company has grown revenue to \$44 million while improving profit margins and per-employee productivity.

Brian highlights the difference INNERGY has made: “I have no idea how we managed without INNERGY. It has transformed every aspect of our business, from how we schedule projects to how we manage finances. It's the most important thing we've ever done as a company.”

Beyond Software: The Power of Education and Nexus

INNERGY's impact extends beyond its software. Brian credits much of the company's success to INNERGY's executive education and collaborative community.

Brian recalls a pivotal insight from INNERGY CEO Marc Sanderson: “Marc always says, ‘Fill the plane with first-class seats.’ That's stuck with me. INNERGY has given us the visibility to focus on high-value work and avoid low-margin projects.”

The company has also benefited from INNERGY's customer-driven updates. “Their commitment to continuous improvement mirrors our own values,” Brian explains. “They're constantly evolving based on user feedback, and it's inspiring to see how much they invest



in making their product better.”

Looking to the Future

With INNERGY as a strategic partner, Taber Company is poised for continued success. The team plans to break out its metal shop operations as a standalone division, leveraging INNERGY’s flexible framework to manage it independently.

“INNERGY has reduced our stress levels,” Brian says. “We can plan better, communicate more effectively, and execute with confidence. It’s not just software—it’s a philosophy that’s reshaped how we run our business.”

Taber Company’s journey demonstrates how embracing INNERGY’s solutions can empower millwork businesses to achieve operational excellence, improve profitability, and build a sustainable future. By focusing on data, collaboration, and continuous improvement, Taber Company has become a model of modern millwork success.