

From Legacy Systems to Lean Execution: How Mission Bell Modernized Operations with INNERGY

Executive Summary

Mission Bell Manufacturing, a leading millwork firm with a 60+ year history, implemented INNERGY to replace their homegrown software and gain real-time operational visibility. With more than 250 employees and a reputation for high-end commercial work, Mission Bell used INNERGY to streamline communication, modernize capacity planning, and improve revenue recognition.

Key Results

- Cut implementation time to just 4 months through a structured rollout
- Gained real-time visibility into production bottlenecks and shop capacity
- Improved forecasting and milestone-based revenue recognition
- Enhanced transparency and accountability across departments

“The forecaster and bottleneck report have been game-changers for us. They allow us to plan production with confidence and maintain profitability.” – Jason Neff, COO

A Rich History and Drive for Innovation

Founded in 1959 as Morgan Hill Millwork, Mission Bell has grown from a small shop into a major player in the commercial millwork space. COO Jason Neff started on the shop floor in the late '90s and worked his way up, gaining deep experience in engineering, estimating, and lean manufacturing.

The company has a long history of technical adoption, transitioning from manual processes to automation and early adoption of Microvellum in 2001. But by 2022, their internally-built software had become too costly and limited in functionality.

“We had built our own system and it worked well—for a while. But we were missing real-time operational finance, integrated supply chain visibility, and consistent processes. The costs of continuing to evolve our own system didn’t make sense anymore.”

The Challenge: Fragmented Data, Limited Visibility

Despite having their own custom-built software, Mission Bell struggled with:

- Disconnected systems and delayed reporting on margins and performance
- Limited visibility into shop capacity and project milestones
- Gaps in collaboration between departments like estimating, PM, and install
- Manual, subjective revenue recognition models that led to delayed insights

Their goal was to replace this system with a unified platform that could scale with the business and support real-time decision-making.

The Solution: A Strategic Pivot

Mission Bell had evaluated INNERGY as early as 2015 but chose to develop internally. After years of maintaining their own system, they re-evaluated in 2022 and made the switch.

“We needed operational insight, integrated inventory and purchasing, and better forecasting. INNERGY gave us all of that—without the massive development costs.”

They kicked off implementation in July 2023 and went live by the end of October—just four months later. Their success was driven by:

- A strong internal coalition with representation from all departments
- Clear communication using John Kotter’s change management model
- Pre-existing standardized workflows that accelerated adoption

Implementation: Fast, Focused, and Effective

Mission Bell’s fast-track implementation was supported by their culture of process discipline and standardization. They:

- Burned the “ships”—cutting over completely to INNERGY on Day 1
- Trained teams on “how we do it today vs. how we’ll do it in INNERGY”
- Leveraged education tracks for onboarding and ongoing development
- Used audit lines and workload meetings to monitor team performance

Resistance to change was present, but transparent communication and leadership support helped overcome initial friction.

Key Results: Real Time Insight and Accountability

With INNERGY in place, Mission Bell now has:

- **Robust forecasting:** Leadership uses the Forecaster and bottleneck reports to plan three months ahead and balance production loads.
- **Clear audit trails:** Weekly workload meetings identify overdue tasks and reinforce accountability.
- **Transparent project tracking:** PMs now manage all milestones leading up to production start, with INNERGY giving visibility every step of the way.
- **Improved financials:** They’re transitioning to milestone-based revenue recognition, eliminating the need for manual adjustments.

“We’re moving from subjective end-of-month adjustments to recognizing revenue based on actual work order completion. That’s a huge leap forward for financial clarity.”

Education and Continuous Improvement

INNERGY’s education platform played a key role in Mission Bell’s successful rollout and ongoing improvement:

- Teams participated in weekly webinars, lunch & learns, and curated playlists



- New hires follow role-specific onboarding tracks
- Leadership reviews every product release and ensures adoption of new features

“We underestimated the time required for product validation, but we’ve built SOPs, validated products, and aligned estimating and PM teams. It’s a continuous improvement cycle.”

Looking Ahead: Supporting Strategic Growth

Mission Bell’s future includes expanding into lab casework, multifamily, and healthcare—with INNERGY supporting new revenue streams and business units.

- New workflows and P&Ls are being developed for each line of business
- Their Seattle warehouse uses INNERGY’s inventory tools to stage and track jobs
- Pre-build and store strategies increase throughput and reduce idle capacity

“We’re using INNERGY to measure revenue per unit and track unblended P&Ls for each initiative. It’s allowing us to grow without overwhelming manufacturing.”

Jason’s advice for others considering INNERGY:

“It’s not going to be easy, but it’s worth it. Communicate clearly. Get full leadership buy-in. And burn the ships—make the new system the only option. That’s how you succeed.”