



# Kelly Roofing

*KELLY ROOFING  
STREAMLINED  
AND AUTOMATED  
BUSINESS  
PROCESSES  
AND ENHANCED  
THEIR SALES AND  
MARKETING WITH  
POWERPACK ADD-  
ONS.*

## CHALLENGE

Kelly Roofing wanted to extend the capabilities and functionality of their Microsoft Dynamics CRM system to help streamline their business processes and enhance their sales and marketing automation.

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## SOLUTION

Microsoft Dynamics CRM

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## BENEFITS

- Easily track stages of a customer's job
- Improved search capabilities
- Send surveys and track responses in CRM
- Score leads to gauge interest



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## About the Organization

Founded more than 30 years ago, Kelly Roofing has grown to become the largest roofing contractor in Collier County, Florida and has been ranked one of the Top 100 Roofing Contractors in America since 2003. As a family-run business, the company is dedicated to combining old world building principles, cutting-edge technology and continuing education to allow them to provide the highest quality roofing systems on the market.

## Situation

Kelly Roofing wanted to extend and enhance the capabilities and functionality of their Microsoft Dynamics CRM system and was seeking a solution that would be both affordable and easy to use. Kelly Roofing uses CRM for lead nurturing, quotes, and managing their entire project cycles. The increased workload on their system meant it needed more capabilities. Kelly Roofing decided to utilize PowerObjects' suite of PowerPack add-ons for Microsoft Dynamics CRM to achieve this goal.

## Solution

When it comes to streamlining and automating business processes, Kelly Roofing has found that the PowerGlobalSearch and PowerGrid add-ons have helped improve efficiency, reduce costs, and boost customer service within their business.

"We use PowerGlobalSearch very frequently and have found that it's a big time saver when we are taking a customer call," says Ken Kelly, President of Kelly Roofing. PowerGlobalSearch allows Kelly Roofing to search for a customer's name or address in all CRM entities and all fields, pulling up any information on that customer - no matter where they are in Kelly Roofing's system.

With PowerGrid, Kelly Roofing has been able to create different views of the stages of a customer's job and lifecycle. "PowerGrid allows us to see a larger view of our customers," says Kelly, "Before using PowerGrid we had to open each individual record. Now we can scroll through a view and make changes quickly to multiple records, all at the same time. With this feature we can update schedules of projects instantly and then update our customer on changes."

For sales and marketing automation, Kelly Roofing has been using the capabilities of PowerSurvey, PowerScore, and PowerWebForm.

By using PowerSurvey, Kelly Roofing is able to send out surveys not only for customer feedback but also to get more information from possible opportunities. "If we have an opportunity that is open in our system, we send an automated survey to judge whether they want to be contacted, need a new estimate, are using a different company, or want to work with us," Kelly says.

PowerSurvey generates automated responses in Kelly Roofing's CRM, converts opportunity statuses based on those responses, and alerts staff of any changes. "PowerSurvey helps clean up our opportunity list automatically and this has been really helpful. It cuts out a lot of maintenance and work for us. Often this results in us winning opportunities—even if we are more expensive—because our system is simple and saves everyone time," Kelly adds.

## ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.

## AWARDS + RECOGNITION

### 2012 + 2013

Microsoft Dynamics Partner of the Year

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### 2011 + 2013 + 2014

Inner Circle for Microsoft Dynamics

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### 2009 + 2010 + 2011 + 2012

President's Club for Microsoft Dynamics

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### 3

Convergence Customer Excellence Awards

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### GOLD + SILVER

Customer Relationship Management



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## Solution (continued)

Another add-on Kelly Roofing uses for sales and marketing is PowerScore, which assigns a number of value to how active a customer is on their website. "PowerScore is great for determining which leads are most active. We can rate them on how active they are and can get them the resources they are most interested in," says Kelly.

Kelly Roofing also uses PowerWebForm for customer service, in addition to lead generation. "We have customers submit a resource of warranty authorization if there was an issue with a job. This helps avoid any potential conflicts and resolves issues quickly," says Kelly. "Another way we use PowerWebForm is for anyone who requires an immediate fix. They can fill out a fully automated form to put them through the booking process right away and can skip the step of having an estimator visit first," Kelly adds.

## PRAISE FOR POWEROBJECTS

*"The fact that a roofer can use CRM to improve their operations has a lot of impact. PowerObjects has done an excellent job of creating individualized add-ons that have a clear focus on the core capabilities that we and other customers want the most."*

KEN KELLY

President of Kelly Roofing

## Benefits

Kelly Roofing has been able to extend the capabilities of their Microsoft Dynamics CRM solution through PowerObjects' suite of PowerPack add-ons. The organization streamlined and automated business processes and enhanced their sales and marketing with these easy to use add-ons.

"We are a small family business with 65 employees in an industry that is not perceived to be especially tech savvy. The fact that a roofer can use CRM to improve their operations has a lot of impact. PowerObjects has done an excellent job of creating individualized add-ons that have a clear focus on the core capabilities that we and other customers want the most," says Kelly.

Kelly Roofing was able to choose à la carte solutions that made sense for their business. With each PowerPack ranging from \$1-\$2 per user per month, the add-ons provide Kelly Roofing with exactly the functionality they were looking for at a very affordable price.

"What sets the PowerPack add-ons apart is how PowerObjects has built pure simplicity around pricing, implementation, use, and set up. As a business owner I can quickly add any of this functionality to my CRM and get them up and running in no time without needing to know any programming," says Kelly. "This is an absolutely affordable solution. Our PowerSuccess subscription is a predictable monthly fee and the PowerPack add-ons are very cheap. There is a lot of opportunity here for the roofing industry to improve by adopting a Dynamics CRM solution," Kelly says.

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