

# KELLY ROOFING REACHES NEW HEIGHTS WITH **POWERSUCCESS** AND MICROSOFT DYNAMICS CRM **IN THE CLOUD**

## CHALLENGE

Kelly Roofing needed to work with an experienced Microsoft Dynamics CRM partner who could show them how to more effectively use their CRM online solution to streamline its sales and marketing processes, improve service management, estimating, and job costing capabilities and increase overall customer service effectiveness and response times.

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## SOLUTION

With the help of PowerObjects and the PowerSuccess service-as-a-subscription program, the firm re-implemented Microsoft Dynamics CRM Online.



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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.

## Challenge

As the demand for Kelly Roofing's services continued to grow, they needed a better way to streamline its sales and marketing processes, improve service management, estimating, job costing capabilities and increase overall customer service effectiveness and response times. As a big proponent of using technology to advance its business, the company initially deployed Microsoft Dynamics CRM online through another vendor but the solution was not meeting their needs based on the initial set-up. "We are in the service business and need to ensure that all of the moving parts throughout our organization are aligned and in-sync. CRM was not set-up initially to meet our business needs and because of this, we struggled with usability issues, low adoption rates and communication gaps across the board," said Ken Kelly, President of Kelly Roofing.

Overall, Kelly Roofing needed the solution to provide the following:

- Centralized database where all interactions could be tracked and be visible by the entire organization.
- Ability to manage the entire customer lifecycle from start to finish and gain visibility into the activities of all the teams.
- Improved ability to quickly scale the business to react to changing weather cycles and seasonal activities.
- Ability to easily customize workflows and automate processes to increase visibility and efficiency.
- Enhanced customer service and support capabilities by leveraging intelligent real-time data.
- Integration with Microsoft Outlook and other Microsoft solutions to help improve staff adoption and use.
- Cost-effective platform to support change and growth.

## KEY BENEFITS

- Ability to manage the entire customer lifecycle from start to finish through Dynamics CRM which has saved a significant amount of time and effort.
- Automation of many tasks and processes through CRM and can handle the increased workload with half the staff even during peak times.
- Improved customer service levels and overall communication resulting in increased referral business.
- Automation of accounts receivable tasks through Dynamics CRM which has reduced the average collection period nearly in half from an average of 40 days to just 21 days.
- Ability to react more quickly to varying weather cycles as well as seasonal activities.
- Increased overall business visibility and reporting for accurate and efficient decision making.
- Ability to access a single data source and cost-effective platform to support growth.

## PRAISE FOR POWEROBJECTS

*"Using the PowerSuccess fixed-monthly fee program allows us to budget and forecast our IT expenses more accurately and as a small business, this allows us to stay on track and better manage our resources."*

KEN KELLY

President  
Kelly Roofing

## Solution

The company decided it was time for a change and needed to make the most of their Microsoft Dynamics CRM 2011 investment. After attending Microsoft Convergence and being introduced to PowerObjects and the PowerSuccess service-as-a-subscription program, they knew it was a perfect fit.

The program allowed the company to work with a dedicated Dynamics CRM expert to ensure they would get the most out of their solution. "When I met with PowerObjects, I felt very comfortable in their ability to understand our needs and how we could improve CRM to fit our business," Kelly said. For a fixed monthly fee, the company has access to a CRM expert who understands their business and can configure CRM to meet their needs. "Unlike the past, with PowerSuccess we don't have to worry about escalating fees or expenses to get help when we need it," he said. PowerSuccess's multi-phase proven process ensures that the customer's needs and goals are being met as well as best practices are being implemented. And if new priorities come up, the customer has an ongoing resource to help support and navigate any changes along the way. "The fixed monthly fee also allows us to budget and forecast our IT expenses more accurately and as a small business, this allows us to stay on track and better manage our resources," Kelly said.

## Key Benefits

"Before we started working with PowerObjects, our CRM wasn't configured to work with our business and it became a big headache for us. Now, having worked with PowerObjects for just a few short months, CRM is working across our business and is so much more meaningful for our organization," said Kelly. One of the greatest benefits the company has realized was the ability to manage the entire customer lifecycle from start to finish through Dynamics CRM which has saved a significant amount of time and effort. "From when a lead comes in to estimating a project, to managing project timelines and deliverables, to handling customer communication and accounts receivables, our entire business lifecycle is now automated through CRM. Whether in the office or onsite, our teams can access the information they need and be more productive in their jobs," he added. Through custom workflows and dialogues, many routine tasks and data entry have also been eliminated improving the staff productivity and overall customer satisfaction.



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## 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

Microsoft Dynamics Partner of the Year

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### 2011

Inner Circle for Microsoft Dynamics

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### 2009 + 2010 + 2011 + 2012

President's Club for Microsoft Dynamics

+++

### 3

Convergence Customer Excellence Awards

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### GOLD + SILVER

Customer Relationship Management



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## PRAISE FOR POWEROBJECTS

*"The pendulum has definitely swung in the positive direction for our business and we have been able to make great strides in a very short time thanks to PowerObjects and their expertise. All I can say is that our customers are happy. We have not had this much work since after the hurricanes and our company is running like a well-oiled machine."*

KEN KELLY

President  
Kelly Roofing

The company has seen its sales pipeline continue to grow and has been able to handle the increased workload with minimal issues due to CRM. "Today, our pipeline is equal to or more than what we experienced back in 2004 and 2005 due to the devastating Hurricanes that came through Florida. The difference today is that we've automated many tasks and processes through CRM, and we can handle the increased workload with half the staff we had during our peak times," Kelly said.

Kelly Roofing customers have also seen a difference in service levels and overall communication. To keep customers in the loop on project status and seek feedback regarding service after a job is completed, the company uses the PowerSurvey tool which is integrated with CRM and available through PowerObjects. "We send a variety of email communications to our customers throughout the project and after a job is completed. Right from CRM, we can proactively send email communication and surveys to our customers which have made a huge difference in our service and satisfaction levels," he said. Microsoft Dynamics CRM also provides the ability to keep information about referrals and also tracks the success rate. "With better communication in place and the ability to track customer feedback through Dynamics CRM, we are proud to say that more than 78% of our business today comes from word-of-mouth and customer referrals."

Many of the accounts receivable tasks have also been automated through Dynamics CRM, which has reduced the average collection period nearly in half from an average of 40 days to just 21 days. "With CRM, we've streamlined our accounts receivable process which has allowed us to accelerate our collections, producing a significant change in working capital," Kelly added.

Dynamics CRM also allows the company to react more quickly to varying weather cycles as well as seasonal activities. "The scalability of Dynamics CRM allows us to respond more quickly to the highs and lows of our business. Because so much of our daily activities are now automated through CRM, we can quickly ramp up and respond to change without having to worry about the resources to support it. This is a huge competitive advantage for us," he said.

Kelly believes that they couldn't have made such progress without the help of PowerObjects and the PowerSuccess program. "The pendulum has definitely swung in the positive direction for our business and we have been able to make great strides in a very short time thanks to PowerObjects and their expertise. All I can say is that our customers are happy. We have not had this much work since after the hurricanes and our company is running like a well-oiled machine," he added.

## Microsoft Partner

2013 Partner of the Year **Winner**  
Customer Relationship Management