

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

Kelly Roofing had successfully rolled out Microsoft Dynamics CRM to help manage relationships with its customers, but they saw room for improvement with communication between the company's office workers, field crews, and customers. Customers and office workers wanted better visibility into where the roofing crews were at any given time, and field service workers wanted better visibility into their daily jobs and timelines.

Crews were spending too much time driving back and forth from the office to different sites to pick up information for specific jobs. Administrators also needed a better big-picture view of job schedules and the ability to shuffle jobs around based on changes to jobs and schedules.

SOLUTION

With the help of PowerObjects as their Microsoft partner, Kelly Roofing rolled out the field service functionality of Dynamics CRM. The solution allows field crews and office workers to communicate more effectively, optimize job scheduling, and keep customers better informed about the status of their projects. The solution's inherent mobility has made it easier for Kelly Roofing employees to do their jobs.

PowerObjects helped Kelly Roofing implement and roll out the field service solution in three months.

BENEFITS

One of the major benefits of the field service solution for Kelly Roofing is that the company has optimized scheduling. They can assign appropriate resources to appropriate jobs based on open jobs, the location of crews, the proximity of other unscheduled work, and other details that impact scheduling work.

The solution also gives office workers a visual representation of all the work that needs to be done in any given day, week, or month. They can easily pull up a crew member's schedule and see when they are booked and when they are available.

For example, if a crew member is scheduled for a six-hour job, office workers can quickly see if there are other small jobs nearby to fill that person's schedule to get work done faster. In the past, this might have been a missed opportunity if the worker was let go early.



*KELLY ROOFING USES
MICROSOFT DYNAMICS
CRM FIELD SERVICE
FUNCTIONALITY TO
COMMUNICATE AND
COORDINATE WITH THEIR
CREWS ON THE GROUND*

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“Kelly Roofing’s experience with Microsoft Dynamics CRM was so successful we decided to leverage Field Service to expand knowledge share throughout the entire company. Now our customers receive the same high level of customer service from commencement through completion.”

KEN KELLY
President
Kelly Roofing

BENEFITS |CONTINUED|

“In just the first month out, we have already set up territories to save drive time and allow faster responses to site,” says Ken Kelly, President of Kelly Roofing. “Our production numbers are up 27% month over month, and we are just scratching the surface of efficiency gains.”

Another huge benefit is the real-time communication between the office and crews in the field. Crews have mobile devices where they can update the status of a job, which reflects back on the schedule board in the office. This means office dispatchers are getting the most up-to-date information and can use that information to continue optimizing schedules and keep customers informed.

Field workers don’t have to lug around laptops to be plugged into the system; all they need is a mobile device or a smartphone. Even if the crew is up on a roof, it’s easy for them to pull out their phones and access all the information they need about a project or their upcoming schedule.

“We have 18 total crews using the field service functionality now,” says Kelly. “Whereas each crew used to perform a daily close out meeting with their Project Administrator to discuss closing of projects, updates and status changes, they now do this on the mobile app. Since the meeting took between 30-45 minutes, and usually went well past 6:00 pm, we are saving 9 to 13 hours daily. And, our teams are getting home at a decent hour.”

The efficiency gains that Kelly Roofing has seen since implementing their field service solution allows them to spend more time handling more complicated issues, rather than trying to hash out schedules.

Kelly Roofing has also seen some key benefits with the added mobile functionality, specifically with automations that contribute to greater overall efficiency. For example, if a crew leader upsells additional features such as gutter replacement or additional tiles while doing a walkthrough with a customer, they can immediately enter that information in the app and will automatically get a kickback in their paycheck. Workers are incentivized to add this information into CRM, which is a win for the crew members and Kelly Roofing as a whole. This also helps with overall user adoption.

Another automated task that the mobile workforce can take advantage of is easily creating follow-up work orders based on a current job, without having to repopulate all the information of an initial work order. The system allows workers to create a follow-up work order based on the current work order and associate it with the customer’s information automatically.



CHALLENGE

As a roofing company with workers in the field, Kelly Roofing needed the ability to tie in their back-end office operations with their field service operations.

SOLUTION

Since Kelly Roofing had already been using Microsoft Dynamics CRM successfully in their business, they were an ideal candidate to take advantage of the new field service functionality in Microsoft Dynamics CRM with field ready mobile capabilities.

BENEFITS

Kelly Roofing’s field crews can get real-time, up-to-date information in the field, making it easier than ever to efficiently schedule and complete jobs.

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BENEFITS |CONTINUED|

Overall, the rollout of the field service functionality in CRM has enabled an increase in bookings for sales reps in the field.

“There has been a complete paradigm shift in the way we go to market,” says Kelly. “Before, we used to send a Project Manager to inspect the work, give a price, take photos and get a commitment from the client. The PM would then turn into the Project Administrator the information for setup and scheduling, which was done in CRM and MS Project separately and took days for dispatch. With field service, we have now shifted to our newly branded Rapid Repair program where the Project Administrator sends the crew directly to the client and all inspection, diagnosis, photos, pricing, agreement, work and frequently payment are done in one shot. This has cut days off of our reponse time and saved our company the cost/expense of sending a Project Manager out ahead of time.”



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