

HELP Prepares Roofing Solutions' System for a Rainy Day

→ SUCCESS STORY

The Challenge ...

Roofing Solutions struggled with their ability to handle business information. While Roofing Solutions used computer-based solutions to manage the data, the tools they used didn't work well with each other leaving the information decentralized, and creating silos of information within the organization.

The Solution ...

Roofing Solutions realized they'd have to embrace newer technologies if they were to drive the growth they sought. While they started with foundational products like Sage CRM and Sage Master Builder, HELP Solutions undertook a detailed discovery process that led to very specific customizations and integrations. In the end, Roofing Solutions had an enterprise-wide platform that would allow them to share detailed information from the initial lead through to accounts receivable.

The Results ...

The new operational infrastructure provided by HELP Solutions has allowed Roofing Solutions to take their business to the next level. The availability of solid management data has meant more business in an economy that says they should be seeing less. With their operational house in order, Roofing Solutions was able to focus on hiring project managers to take on new business, without having to hire cost-center staff to support them.



Roofing Solutions' owner and founder Tupac A. De La Cruz started his company in 2004 with one simple goal: "to be the most reputable, respected and reliable roofing partner to its customers." Today, this vision serves as the foundation for a commitment to excellence and Mr. De La Cruz guarantees the best roofing system available, accuracy in project estimating and budgeting, professional management of projects and an exemplary commitment to safety.

Information Leaks

Roofing Solutions really struggled with their ability to handle business information. Details on new business leads, data on the project bid and even the facts surrounding a win or loss were floating around the company, but weren't being managed in a meaningful way. Information on existing and completed projects was equally as allusive. While Roofing Solutions used computer-based solutions to manage the data, the tools they used didn't work well with each other leaving the information decentralized, and creating silos of information within the organization.

"We were using QuickBooks to manage our accounting functions, Microsoft Excel to manage our project information and Microsoft Outlook to manage contacts," said Tupac De La Cruz, founder of Roofing Solutions. "Making all of these tools work together was largely a manual process. We are in the roofing business, yet we were spending far too much time managing the business of information flow."

Incompatible technology wasn't the only challenge at Roofing Solutions. The culture of the construction industry isn't exactly steeped in communication. "Business Development professionals in the construction industry feel a sense of ownership of their customer data," said Tupac. "They don't feel the need to

share that information with others in the organization which leads to silo-building, and breeds inefficiency," Tupac added. While salespeople would know the details of a project, that information wasn't always transitioned to those that needed to know within the organization. These problems were only compounded by the fact that Roofing Solutions sometimes sub-contracted their work.

Further, when information was shared, it wasn't always the correct information. Different versions of the same project spreadsheet would circulate the company. Who had the most current version and how should users handle updates to that information? "When projects wind down, we typically see a 'punch list' of open items we need to clear up before we can expect payment," shared Tupac. "We noticed that these punch lists were being lost in the process which would lead to delayed payments and frustrated clients."

Filling The Holes

While the roofing industry was born long before computers, Tupac soon realized that if he was going to differentiate himself, and grow his business in today's competitive market, he'd have to embrace newer technologies that could help drive the growth he sought. What he needed was a better way organizing the information that passed through his company. He needed to be able to share it with those that needed it, and he needed to be able to analyze it so that he could learn from his successes and failures.

Tupac was introduced to HELP Solutions, a Sage Solutions Partner, who suggested they might be able to help Roofing Solutions gain control over operations. "We met with Tupac and it was clear right away that he 'got it,'" said Stephanie Rials, project manager at



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www.roofingsolutionsla.com

Company Profile

Type of Business:

Commercial roofing

Headquarters:

Prairieville, LA

System Profile

SageCRM

Sage Master Builder

HELP Solutions

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HELP Solutions. "We took the time to really learn about his challenges and understand his business. We didn't want to simply throw technology at him. We knew that for Tupac to really use his business information that we'd need to help him organize his operations around technology from the ground up."

The common goal in this project was to automate the flow of data to allow Roofing Solutions to do more business without having to hire additional staff to manage the business' operations. "We have strong expertise in business and process management," said Patricia Welther of HELP Solutions. "We have a unique ability to understand a company's operations and tailor a solution to address the specific business problems companies have."

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A Water-tight roof

In a slowing economy, companies cannot afford to operate inefficiently. Companies need to adapt and employees need to do more, with less. The new operational infrastructure provided by HELP Solutions has allowed Roofing Solutions to do just that. Moreover, the availability of solid management data has meant more business in an economy that says they should be seeing less.

"The centralized system has allowed us to be much more efficient," said Tupac. "We are able to follow up on calls, track pre bids and our win rates have gone up over last year. Before the new tools there was not as much follow up. We had to dig thru papers and call on bids and proposals. Now I have a list with all proposals

and opportunity; I can follow up and follow through. The new tools save a lot of time which allows us to bid more projects and follow up on more leads."

The new tools have also allowed Roofing Solutions to be more efficient within the projects themselves. "Our vision is to be completely paperless," shared Tupac. "We plan to move everyone to touchpads once they are more prolific. This will empower our Project Managers to respond to in-field questions or changes immediately. The automation provided by the new Sage platform will allow us to access all customer-related information, plans, and correspondence directly from the field. No more waiting until we get back to the office to dig it up, scan it, and email it to them. When we complete our paperless transition, we'll have the information at our fingertips and can resolve problems immediately."

When it comes to personnel, every new hire must make a direct and immediate contribution to the bottom line. With their operational house in order, Roofing Solutions was able to focus on hiring project managers to take on new business, without having to hire cost-center staff to support them. In an interesting twist, employees were hired with the new technology in mind. Because of this, they were able to hit the ground running and are actually helping to drive even more efficiencies using the tools provided by HELP Solutions.

"The whole project went better than expected especially given that we made the change during two significant hurricanes," said Tupac. "I've been more than satisfied with our decision to use HELP Solutions. They really understand our challenges and prescribed just the right solutions to meet our needs. We have a completely automated system and that means nothing gets lost in the process. We're making more money with fewer resources and we're improving customer service at the same time."



HELP Solutions works with businesses to develop and implement Customer Relationship Management (CRM) solutions. We help improve the effectiveness of your people, streamline your processes, and utilize technology to increase customer retention and profitability.



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