



Kelly Roofing

Customer Success Case Study



Award-Winning Roofing Contractor Deploys Experlogix CPQ with Microsoft Dynamics 365 to Deliver Fast, Accurate Project Quotes to Clients

Challenge

Kelly Roofing relied on a per-piece pricing method, or a calculation based on the square footage of a proposed roof. Neither of these pricing methods was ideal. The company found that they were losing business because of inadequate quotes or lost money on projects when their quoting procedure didn't address all the costs. Kelly Roofing constructed quotes with an Excel spreadsheet, which was difficult to support and allowed employees in the field to make configuration mistakes.

With prices for materials changing rapidly, Kelly Roofing needed a better way to make sure their salespeople were generating quotes consistent with current conditions.

"Some of our biggest challenges were keeping all salespeople using the same pricing, offering the same products, and being able to update the price list in real time," said President Ken Kelly.

Under the spreadsheet method, Kelly's salespeople would sometimes mix details from different roofing systems. These errors impeded the company's ability to price the projects accurately and order the proper materials for the jobs.

Product

- Experlogix CPQ

Benefits

- Increased top line by over 300% and doubled bottom line
- Improved the speed and accuracy of quotes for sales team
- Automate BOMs
- Improved customer experience
- Immediate updates in price and product variables are pushed out to every user
- Ability to work on multiple quotes at a time
- Faster time to market with new product option

Tech

- Microsoft Dynamics 365

Solution

The company switched to Experlogix to correct their price quote problems. Experlogix's CPQ system updates prices at once for all users. After upgrading to Experlogix, salesperson quotes included the most recent updates.

The Experlogix software also allows salespeople to include options and upgrades in their proposals, something the company hadn't been able to offer under their old system.

Integration with Microsoft Dynamics was an important feature that Kelly Roofing sought in their search for CPQ software. The company's business relies on Dynamics to handle much of their business operations. The tight integration meant that the company wouldn't have to deal with conversions or complicated data transfer steps to include Experlogix in their existing workflows.

Because of the built-in integration, employees at Kelly Roofing discovered that the new system saves them lots of time. Salespeople no longer spend their nights assembling estimates after devoting all day at job sites gathering data. Everyone is enthusiastic about the software. Resistance to change was minimal because of the personal benefits of using the new system.



Result

Experlogix helped Kelly Roofing increase their revenue and net profits. Now, when salespeople deliver a proposal, they can include options and upgrades that boost revenue. The flexibility enabled by the Experlogix system also gives salespeople more opportunities to close a deal. Instead of delivering a single solution, Kelly Roofing salespeople can show customers multiple options at various price points.

“Experlogix has helped us to increase our revenue because we are now delivering options in our proposals. The customers can choose from optional upgrades that help them buy the roof that best meets their needs and budgets,” said Kelly. With its rules-based configuration, Experlogix has virtually eliminated salesperson quoting errors. Now, salespeople answer some questions, input the project specifics, and the system generates accurate quotes.

The new CPQ system also makes it possible for Kelly Roofing to launch new products quickly. When they became authorized installers for the new Tesla Solar Roof System, the Kelly team input the new price list and added a few equations. Instantly, the entire sales team had access to the new products, ready to quote for customers.



“Since we’ve implemented Experlogix, we’ve seen more than a 300% increase in our top line. And, we’ve more than doubled our bottom line. For us, it’s paid for itself time and time again.”

Ken Kelly
President

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