



Case  
Study

## One of America's Top Roofing Contractors "Saves 100% in Overall Resources"

### About Kelly Roofing

Kelly Roofing is a premier roofing company providing roof repair and roof replacement services all over Florida, from Fort Myers to Naples. Naples Roofing Company is a family business that has grown to become one of the largest roofing contractors in Florida; and now belongs to America's Top 100 Roofing Contractors.

A combination of old world building principles, cutting edge technology, and continuing education allows the company to bring the highest quality roofing systems on the market. The roofing systems (tile, flat, shingle, and metal roof) services include roof repair/restoration & replacement. The services they have been offering for more than 30 years, are beyond average — the Naples Roofing Company also proffers the installation of the gutters, insulation, and skylights.

**Customer**  
Kelly Roofing

**Solution**  
FieldOne Sky based on Resco Mobile CRM technology with Microsoft Dynamics CRM 2016 Online & Woodford Configurator

**Type**  
Public company

**Industry**  
Construction

**Organization Size**  
11-50 employees

**Headquarters**  
465 Production Blvd.  
Naples Florida 34104  
United States

## Business Challenge

Kelly Roofing promises “Beauty & Life Time Warranty” to the customer who needs a roof repair or a roof replacement.

The roofing industry accounts for 11 million tons of waste in the US each year. The team of the field installers of Kelly Roofing is dedicated to help reduce the amount of waste generated by the re-roofing jobs.

In order to do so, they must ensure, the team of installers perform an outstanding job in the field. The installers and the crew that control and manage the whole process, must be at the place where renovated roofs are needed. The crew consists of a supervisor, an administrator, and a dispatcher.

*“One of the requirements our clients have is to have insight for our crews that are doing the work — each crew has a supervisor that needs some high level information about the crew to see what they are up to today.*

*The rest of the crew is made up of an administrator and a dispatcher that are in charge of scheduling the work and has insight to all the work that has been scheduled.” — Ken Kelly, President at Kelly Roofing described*

To be able to gain this insight, Kelly Roofing aimed to provide the crews with a modern and intuitive system serving as a perfect fit for their field service workers. The crews’ daily agenda is to create work orders directly where the roof service (repair, restoration, or replacement) takes place.

To deliver professional service, the crew needed to find and start utilizing a system capable of designing complex work orders. Supervisors, administrators, and dispatchers were clearly lacking a solution that would let them create, complete, and edit the work orders whilst in the field. Hence, mobile CRM turned out as the most ideal option to consider.

## Desired features of Work Orders

### High-level quality

High-level can be represented by the advanced features such as having a Spanish/English language localization (Spanish speakers account for more than 23 % of Florida’s population), photo capturing & attachments, signatures, and much more.

### Offline sync

The office staff requires 24/7 updates on where each crew is at all times. The phone service tends to cause issues in this manner, therefore, a highly stable solution competent of an extremely fast synchronization with the office/desktop CRM (Microsoft Dynamics CRM) was a requested feature.

### Crew Localization

Whenever a customer contacts the dispatcher, he/she needs to get the information verified first-hand on a crew’s location from the dispatcher. The dispatcher will then use the system to localize the crew’s checkpoint straight away and the information will appear in the system.

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**Ken Kelly**

President at Kelly Roofing

## Repeatable processes/tasks

A part of a field technician's job requires a lot of manual creations and repeated tasks. A simple solution added to the body of work are the Work Order templates; and the 'on-the-go' system equipped with a great business logic, that would simply do the job for him/her. Templates would allow for the creation of a specified set of Work Order templates, in a way that the template can contact one or multiple Work Order tasks, products, or services which can be later be used for an Invoice generation.

## A modern and intuitive UI

One of the requirements of the solution that would simplify the job of the crews was to make user adoption a breeze. Once they see that information is easy to expose and group into entities and subgroups that are simple to work with; the more the users will get a strong grip of Resco Mobile Solution, in a shorter pace of time.

## Solution

Kelly Roofing has 18 crews that are always in the field. Most of their job is done out-of-office. Hence, they needed a suitable solution to boost their performance, and go mobile. PowerObjects are a renowned Microsoft Dynamics partner and has been helping Kelly Roofing implement and manage Microsoft Dynamics CRM solution.

*"We've been very happy using Microsoft Dynamics CRM, but soon realized, there was something missing. It was a suitable mobile client that would not only complement, but bring the functionality that is missing (mobility, etc.) to the solution. Since we were teamed up with PowerObjects, we knew from the very start that implementing Resco Mobile CRM was the right move to make," – Ken Kelly, President of Kelly Roofing, explained*

## Clear Choice

With no competition in mind, Kelly Roofing carried on with FieldOne services. The FieldOne Sky application is a mobile solution for field workers solidly based on Resco Mobile CRM technology. FieldOne is a set of Resco's field service management features; e.g.: work order management, asset management, maintenance agreement tracking, inventory and procurement management, workflow capabilities, mobile collaboration, and other custom entities.

*"I really like the modern form, UI, related entities and subgrades, that's awesome, I love being able to scroll through any related entity. Super simple, it's amazing to have that functionality in mobile devices," said Chris Powers, PowerObjects about Field One Sky based on Resco Mobile CRM.*

Kelly Roofing rolled out the mobile solution for all 18 crews. They are now running it on Windows Lumia Phones.

## More than a mobile CRM

To get the full usages of a mobile platform in the field, Kelly Roofing would only go with a mobile solution that came with a customization tool to get the job up to speed; and also a customization platform that configures the mobile CRM with just a few clicks. This is where Resco's customization tool, Woodford came into play.

*"As long as you understand the structure of the database in CRM, and how you can expose the appropriate entities and attributes within Woodford, you will be set up for success. In addition to determining what is displayed to the user, having an understanding of the security and managing the devices connecting to the environment is critical." — Ken Kelly, President of Kelly Roofing*

Woodford turned out to be incredibly intuitive to walk through. It enabled the indication of any additional fields to be added or fields that are unnecessary from the company's perspective. The customers quickly learned to understand when the change is being made, and once published, see that replicated on their mobile device immediately.

## Benefits

### Out-of-the-Box Woodford Customizations

*"Out of the box customizations were so time consuming, difficult, and unreliable; we had actually given up on an out-of-the-box mobile platform to use. With Woodford, we have realized what the platform promised, mobile management and efficiency." — Ken Kelly, President of Kelly Roofing*

### Time efficiency & increased productivity with Resco Mobile CRM & Woodford

There has been a complete paradigm shift in the way Kelly Roofing markets itself, since the roofing company started using mobile CRM.

*"Before, we used to send a Project Manager to inspect the work, give a price, take photos, and get commitment from the client. He would then turn into the Project Administrator for setup and scheduling, which was done in CRM and MS Project separately, and took days for dispatch. All 18 crews used to perform a daily wrap-up meeting with their Project Administrator to discuss the closing of projects, updates, and status changes. Now, they do all the verifying and closing within the app — hence, there is no need for a project administrator to step in. Since the meeting took between 30-45 minutes, and usually went well past very late evening hours, we are saving between 9 and 13 hours daily. And, our teams are getting home at a decent hour.*

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**Ken Kelly**

President of Kelly Roofing

*With Mobile CRM, we have now shifted to our newly branded Rapid Repair program, where the Project Administrator sends the crew directly to the client and all inspections, diagnosis, photos, pricing, agreement, work, and frequent payments are done in one shot. This has cut days off of our response time and saved our company the cost/expense of sending a Project Manager out ahead of time.” — Ken Kelly, President of Kelly Roofing*

*“Our production numbers are up 27% month after month; and we are just scratching the surface of efficiency gains.”*

**Ken Kelly**  
President of Kelly Roofing

## Advanced Work Orders

Work Orders are a body of work for the roof repair & replacement crews. Resco Mobile CRM allows them to manage high-level work orders:

- The app provides all the **service tasks and other high-level information** (such as general product descriptions, etc.) in both **English and Spanish**
- They can easily **capture photos and attach them** to Work Orders
- Each crew is required to perform a **follow-up** after the job is done as a part of a Work Order in a system
- The **signatures** are requested at the final walk-through with a client
- Additional boxes that serve as a **motivator are added as needed**

*“There is also an option to include additional pieces of work within Work Orders, which is absolutely great for the crews, because they are paid for the work they do—this way, they are able to see a direct impact they have. All of this is done in the field, so they can actually see, how much they are getting paid, and based on this, we saw it have an impact on their job as a useful motivator.” — Ken Kelly, President at Kelly Roofing*

- With an **offline/online mode functionality**, a dispatcher is always aware of the current status of each crew that has had a roof scheduled for a day
- Replacing manual creations of work orders with **automated processed templates** saves time for the field workers on-site

## 100% saving on overall resources

*“Perhaps it’s too early to tell as of yet, but we haven’t realized double the production or anything like that. However, if you take into consideration of not having to send a Project Manager out ahead of time, it’s absolutely a 100% savings in overall resources.” — Ken Kelly, President of Kelly Roofing*

## Increase in production by 27%

Ever since Kelly Roofing implemented the new found efficiency of FieldOne Sky based on Resco Mobile CRM, the company is looking for the best way to utilize it. In the first few months of usage, it has set up territories to save drive times, and allowed faster response time to working sites.



Learn more about  
Kelly Roofing  
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Resco Mobile CRM  
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