

RDS Manages Explosive Growth with Tailor-Made CRM Application

Roof Diagnostics Solar (RDS) needed a solution to track more than 18,000 leads generated annually through a unique lead generation program based in over 250 big box retail stores. Rather than selecting an one-size- its-all solution, RDS implemented a customized customer relationship management (CRM) application built on Quick Base. By tailoring Quick Base to it its own needs – and nothing more – RDS has seen its lead-to-close time shrink dramatically.

The Challenge

- Manage exploding volume of leads from retail kiosks
- Tailor solution to RDI's unique lead-to-close process
- Scale to accomodate rapid growth
- Maintain high-quality customer experience

The Solution

- Centralized CRM to manage lead-to-close process
- Google Maps integration to qualify potential customers
- Real-time data syncing for in-store appointment scheduling
- Assign follow-up appointments based on representative proximity and availability

The Results

- Scalable system for capturing, processing, and tracking leads
- Appointments per rep increased 50%
- Lead-to-close time improved 100%
- Greater efficiency allows employees to focus on process improvements



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"Without Quick Base, maintaining a top notch customer experience while experiencing exponential growth would not have been possible."

Kelcy Pegler, Jr., CEO and co-founder,
Roof Diagnostics Solar

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Profile

Roof Diagnostics, Inc. (RDI) is a fast-growing provider of residential roofing and energy solutions. Since pursuing a unique solar integration strategy in 2011, RDI has expanded into four new states and grown from 25 employees to 415, with revenue growth of more than 500%.

Industry

Solar Energy

URL

www.roofdiagnostics.com

Demand for residential solar energy systems is at an all-time high. For Roof Diagnostics, Inc. (RDS), a New Jersey-based installer of residential roofing and energy systems, keeping up with an exploding volume of customer leads required a customer relationship management (CRM) system tailored specifically to RDS's business model.

After carefully considering its options, RDS opted for a streamlined CRM system built on the Quick Base platform. RDS now relies on the customized system to manage its lead-to-close process for more than 18,000 new customer leads per year. Since it began using the application, RDS has reduced its lead-to-close time by 100%.

"We would never have been able to maintain quality of experience with the volume of leads, sales appointments, and conversions without this type of specialization in our platform," says RDS co-founder and CEO Kelcy Pegler, Jr. "Quick Base has become an integral part of our business."

Managing exploding growth

According to research by the Solar Energy Industries Association, a new solar project is installed every four minutes in the U.S. Skyrocketing demand is having a real impact on the energy economy - forcing solar providers to grow quickly in order to keep pace. Since venturing into solar installations in 2011, RDS has grown from 25 employees to 415 and seen revenue growth of more than 500%. RDS now installs solar energy systems in five states, partnering with energy providers to provide solar installations at no cost to homeowners in exchange for long-term, low-rate energy contracts.



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The success of RDS’s residential solar business starts with a sophisticated lead generation program that drives a huge volume of leads while maintaining a high-quality customer experience. The program starts in more than 250 Home Depot stores, where RDS representatives educate potential customers on solar energy systems, qualify customers for free solar installations, and schedule follow-up appointments. The program currently generates between 50 and 75 appointments per day, meaning RDS tracks over 18,000 highly qualified customer leads per year.

Keeping pace with the volume of leads required a software solution that could track customers from the moment they engaged with a representative at a kiosk to when the installation project began. Off-the-shelf customer relationship management (CRM) systems like Salesforce.com offered too much pre-built functionality, according to RDS co-founder and CEO Kelcy Pegler, Jr.

“We try to keep our business very simple,” he says. “We made a wish list of exactly what we wanted, and our question was ‘Why can’t we just have only what we want?’” Working with its technology partners, RDS opted to build a customized, streamlined CRM using Quick Base. Quick Base Solution Provider VeilSun helped RDS implement an initial solution in just 60 days. Within 4 months the solution had been finalized.

“Kelcy and his team understood that it wasn’t just sales that was going to make them grow as fast as they wanted to, but that they needed to invest in an operational application to power the engine,” says Rich Crum, co-founder of VeilSun. “The success of the application is that it fits how RDS wants to do business. They didn’t have to fit themselves into someone else’s ‘software box’ and they knew it.”

How it works

The sCRaM (Solar Customer Resource and Management) application is tailored exactly to RDS’s unique process for customer relationship management. Customer data and activities are tracked through the following steps:

An in-store representative enters a potential customer’s information into the sCRaM application.

Through an integration between Quick Base and Google Maps, the representative can pinpoint the customer's house and assess whether shade, roof hazards, roof pitch or orientation disqualify the customer from a solar energy system installation.

The in-store representative schedules a follow up at-home appointment by searching for available time slots based on the customer's geographic area.

After the in-store engagement is finished, the team at RDS assigns an available representative for an at-home appointment based on the location and time of the appointment. RDS then places a confirmation call to the customer.



Once a customer signs up for a solar energy installation, the customer data generated in sCRaM is moved into RDS's project management application.

At each step in the process, customer records, Google Maps information, and representatives' schedules are updated seamless in the cloud, giving RDS the speed and accuracy it needs to maintain a good customer experience.

"Realtime data syncing is extremely important today," says Pegler. "Nobody wants to wait. Speed, reliability, and security are all essential. We're really happy that we have a program that speaks to our business specifically, and we're not trying to fit square pegs into round holes."

Paying dividends

According to Pegler, RDS's Quick Base implementation was successful in part because he and other company leaders spent the time to map out processes and envision the exact solution required to tackle the challenge. "The easy route is to take existing software that everyone else uses and say 'I should too.' The path less traveled is to sit down and take the time to map out what you do, how you do it, and what you're trying to accomplish," he says.

At an estimated 60-70% savings from a comparable Salesforce.com implementation, RDS was able to achieve several tangible benefits, including:

- a 50% increase in appointments per representative
- a 100% improvement in lead-to-close time
- instant scalability when establishing operations in new geographic areas
- easy reporting on customer lead times, appointment progress, and other key data points

As RDS continues to expand into new markets and products (RDS is now piloting other smart energy systems), Pegler says having a platform that offers the right solution for RDS – and nothing more – provides a good foundation for continued growth.

"We didn't want a cookie cutter solution," says Pegler. "It was important that our software platform provided the information and process framework to reflect our business and its fast, real-time pace. Without Quick Base, maintaining a top notch customer experience while experiencing exponential growth would not have been possible."



About Quick Base

Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes more than half of the Fortune 100.

For more information, please visit: www.QuickBase.com