

CUSTOMER **SUCCESS** STORY





Roof Repair Specialist

Delivering Quality Roofing Solutions with Exceptional Customer Service

Roof Repair Specialist was started by brothers Andre and Chris, and they both pour their hearts and souls into the family business.

Since opening our doors in 2011, customer service has always been their top priority. Their core service started with roof repairs and has since expanded to roof replacements, maintenance, and Roof Maxx. They have successful projects ranging from small leaks in garages to 200-unit HOA complexes. No matter the size of the job, their core focus is to deliver quality roofing solutions with exceptional customer service.

Headquarters: Burbank, CA | **Industry:** Construction | **Website:** roofrepairspecialist.com

The Challenge

Roof Repair Specialist had just purchased Salesforce and was not able to successfully complete the build for the sales team. The goal was to create a system that could be used from the very first phone call with a potential client all the way to sending an invoice once the job had been completed. They needed a true lead to invoice solution.

- Needed a single source of truth for the company that could be used by every department and could capture both internal and external communications
- The internal process for the onsite team was very intricate and required complex automation to replicate
- Multiple integrations with 3rd party applications (Conga, Chargent, Intermedia, QuickBooks, & SharinPix)
- Email Templates needed to be dynamic and present different data when specific criteria were met (location, permit status, job type)
- QuickBooks integration was needed for the accounting team to speed the revenue recognition process
- Project Managers needed automated notifications when the onsite team experienced delays



The Solution

The Cirrius Solutions construction Pod started with an initial strategy phase to build an end-to-end roadmap to achieve Roof Repairs vision and goals for roofing focused construction activities. The Cirrius team developed a digital strategy for both sales and field service to support quickly growing practice. We built the needed external communications to for a better client experience, simplified internal usability and better field operations management.

- Completed the set up and configuration of Sales Cloud and Field Service operations
- Using Field Service automation, the ETA of the onsite team would be sent to the customers in real-time
- Created a texting process to gather information from the onsite team, update the project, and notify different managers if there was a need
- Constructed a branching flow for the sales consultants that would ask different questions based on the roof and work type. It would then open the SharinPix app and instruct the user which areas needed to be photographed based on the information collected
- Created a flexible Work Order creation process that would automatically pull data from multiple objects and allow the user to create a linked service appointment that would select the best consultants for the job based on resource skills, location and availability



“The Cirrius team has been nothing but a pleasure. We interviewed several companies and felt Cirrius Solutions was the right fit for us. We couldn’t be happier with our decision. Our company takes pride in having exceptional customer service, and Cirrius Solutions showed that as well.

It didn’t feel like we hired a third party. It felt like they were part of our company. They took the time to listen and treated the project like their own. No one in the company had any developing background, so they broke everything down where anyone could understand what was happening.

We had a lot of complex processes, and they were able to come back with real solutions/answers. We didn’t even know where to start, but they held our hands like the first day of kindergarten. It was effortless to communicate with them.”

**Andre Afsharian –
Chief Executive Officer**



The Result

The Roof Repair Specialist team is now fully setup on the Salesforce platform with an optimized field service process. The owners have better visibility into field service operational data that is critical for their field level staffing and planning. They are now able to confirm that all roofing supplies are available at the job site before sending the crew(s).

To enhance the client experience, the Cirrius team implemented external notifications to proactively communicate information about the crew (pictures and phone numbers), arrival date & time, workorder estimates, and site expectations that can be emailed directly to the customer. The effectiveness of the new process was measured by new analytics to monitor installations and customer satisfaction.



“At Cirrius Solutions, we understand that time is your most valuable asset. We work with your business leaders to drive platform automation across the organization in order to save everyone involved much needed time. We provide white-glove service without the luxury price tag. We are built on integrity. We focus on building long-term relationships with our clients to provide strategic value.”

Chad Anderson
Founder |
Cirrius Solutions

- Converted an extremely manual and time-consuming front-to-end process into one that is highly automated and dynamic
 - ◆ Before: Must edit email templates in MS word, sales consultants and technicians had to gather data on forms and reenter data at office, customers did not know when onsite team had arrived, invoicing was done in different system
 - ◆ After: Emails dynamically populate relevant data and hide fields if they are empty, consultants can use their phones onsite (even offline) to capture customer data & pictures, customers are able to see where the consultants are as well as their ETA
- Better executive decision making by utilizing new reports and dashboards to provide visibility to their field service operational data
- Field roofing teams are 40% more efficient now that all needed roofing supplies will be at the job site before the crew(s) arrive
- Faster revenue recognition from adding onsite payment processing functionality
- Improved customer satisfaction with the implementation of post-project surveys

Ready to move forward on your next Salesforce project?

Learn more about how Cirrius Solutions can help you make the most of your Salesforce.com investment. Please contact your Cirrius Solutions Account Manager directly at info@cirriussolutions.com for more information.