



Embracing Change: Change Management and Technological Transformation with Erie Home

Products Utilized



Sales Cloud



Field Service



Marketing Cloud

OVERVIEW

- In business since 1976, Erie Home is the market leader and largest residential re-roofing company in the United States. Erie Home also installs the best-performing basement waterproofing solutions for complete home water management solutions.
- Based out of Toledo, OH with **over 75 locations** across the US, Erie sought to transform their business processes & technology stack to support their goal of efficient lead to cash process to maximize scalability
- Represented one of the largest transactions for Salesforce in the SMB segment

CHALLENGES

- Tech solutions used for day-to-day operations becoming dated
- Multiple CRM systems were used zero system integrations
- Home grown, unsupported, custom legacy CRM was limited in capability, provided no downstream system integrations for data flow into accounting systems and was not scalable to support explosive growth
- Customer facing & internal transactions were completely manual, unsecured, and provided no real time visibility
- New-user provisioning and training was a time-consuming process

SOLUTION

- Created a scalable platform that will grow with Erie as they expand into new territories, offer new products, and purchase other modern software solutions.
- Unify the lead-to-cash process on a **single platform** - Salesforce!
- Included mobile-friendly configurations with the Salesforce Mobile App to let sales reps complete their work and update in-office teams on a **real-time basis**.
- Integrate SF with third-party vendors to **streamline and automate** manual processes
- Piloted across three locations for improved OCM and training materials prior to launch remaining 47 locations across all 10 platforms on launch day