

Customer Testimonial: Microsoft Dynamics CRM

Kelly Roofing LLC

Combining Traditional Know-How with Modern Insights: A Firm's Journey to Digital Transformation



For Kelly Roofing, it's the consistency that separates them from the competition. With Dynamics 365 for Financials, they finally have the comprehensive insight needed to drive business forward and see in real time how the business is performing.

"With Dynamics 365 for Financials. I can really drill down into data in ways that I never could before. Now, we have these awesome metrics that show us how we're performing companywide, and we can leverage that information to improve the organization. We can decide where we need to invest more, whether it's training, marketing, or something else."

Ken Kelly
President

Every geographic region has its challenges, but if you're a builder or property owner, Florida presents a few extra quirks. In addition to withstanding the rigors of rain, heat, and humidity, buildings are often in the path of hurricane-force winds. In southwest Florida, Kelly Roofing has been protecting people from the element for over three decades.

A small, family-owned business, Kelly Roofing draws on more than 30 years of local experience, extensive knowledge of construction techniques and materials, and something else you might not expect. "When you think of a roofing company, you don't usually think of a business that might be tech-savvy," says Ken Kelly, President of Kelly Roofing. "We take advantage of technology because it gives us a competitive edge in the marketplace. We value human intelligence more, but we use technology as an accelerator and a way to ensure processes."

Accelerating Business with Cloud Services

In 2015, the company adopted Microsoft Office 365 and Microsoft Dynamics CRM Online, now part of

The largest roofing contractor in Florida's Collier County, Kelly Roofing is a second-generation, family-owned business. Two years ago, the company began its digital transformation with Microsoft Office 365 and Microsoft Dynamics CRM Online, and it won the Modern Small or Medium Business category of Microsoft's 2015 Visionary Award. Since then, the company continues to build its competitive advantage with the adoption of Dynamics 365 for Financials.

Customer

[Kelly Roofing, LLC](#)

Products and Services

[Azure](#)

[Dynamics 365 Business Central](#)

[Dynamics 365 Field Service](#)

[Dynamics 365 Project Service](#)

[Automation](#)

[Dynamics 365 Sales](#)

[Office 365](#)

[Power BI](#)

Products and Services

[Professional Services](#)

Organization Size

[Medium \(50-999 employees\)](#)

Country

[United States](#)

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Dynamics 365. The cloud apps gave Kelly Roofing the platform it needed to centralize customer information and automate as many tasks as possible. The adoption paid off, helping the company increase per-employee revenue from US\$75,000 to \$160,000. Over the next two years, Kelly Roofing expanded its cloud consumption and even created an app hosted on Microsoft Azure that gauges moisture levels in roofs. "Office 365 was our first experience in the cloud, and it enabled us to have everything that Office provides, along with email, as a managed service. Microsoft managing all that for us has taken away the IT burden and given us virtually 100 percent uptime."

Within two years, Kelly Roofing had transformed business operations. "We're using what's now Dynamics 365 for Financials to not only acquire customers, but to manage the entire production process as well, including field and project service," says Kelly. "And we're connected to Internet of Things services and doing really cool projects with Azure."

Eliminating Bottlenecks

But when business operations reached what Kelly calls the "third phase," or financial processes, the company lost momentum. Kelly Roofing was using Intuit QuickBooks, which lacked the integration and automated workflows the company had otherwise become accustomed to. "We were taking all these great steps forward, almost to the level of sprinting through our operations, and then we got to financials and just fell," Kelly recalls. "It really hurt our organization, because we couldn't scale our financial processes fast enough to keep up with business growth. We had to hire more people to keep up with the financial side of things, and we had a piece of software that didn't talk to anything else and required us to set up and manage a whole new silo of information."

The lack of insight was particularly frustrating to Kelly, who likened making business decisions to "driving a car while looking in the rearview mirror." So when he learned that Dynamics 365 for Financials would be available, he didn't hesitate to jump on board. "We went from QuickBooks Enterprise, which had been a 25-year commitment, to Dynamics 365 for Financials in 30 days," says Kelly. "The Dynamics team just made it so easy."

Gaining Real Time Insight for Better Decisions

Now, Kelly finally has the comprehensive insight he needs to drive business forward. "With Dynamics 365 for Financials, we've been able to see in real time how the business is performing," he says. "We can see real-time job costing and invoicing, see whether we're overcharged, and compare the numbers to our production schedule."

Kelly takes advantage of multiple capabilities to gain insight, including the Dimensions feature in Dynamics 365 for Financials. Dimensions are attributes and values that categorize entries for easier tracking and analysis. For example, Kelly can set up separate dimensions for zip codes, employees, or assets such as vehicles. "With Dynamics 365 for Financials, I can really drill down into data in ways that I never could before," says Kelly. "Now, we have these awesome metrics that show us how we're performing companywide, and we can leverage that information to improve the organization. We can decide where we need to invest more, whether it's training, marketing, or something else."

Building a Competitive Advantage

It should surprise no one to hear that Kelly Roofing is already expanding the platform's capabilities. Using the ChargeLogic feature in Dynamics 365 for Financials, the company has enabled customers to make payments directly from emails or texts. Customer records are automatically updated, eliminating the need for manual data entry. Kelly Roofing has also started using Dynamics 365 for Field Services, which will optimize the company's ability to meet service level agreements by optimizing routing and scheduling. Working more efficiently is a necessity in an industry experiencing a severe labor shortage, and it also keeps customers happy. "If I make a promise to a customer that we'll be there on Tuesday, I can ensure that our team is going to deliver," says Kelly. "With Dynamics 365, if someone can't work, somebody else will automatically be notified. It's that consistency that separates us from everyone else."

Other Kelly Roofing initiatives include visualizing data with Microsoft Power BI, and new IoT projects. With the right technology in place, this small, family-owned business shows no sign of slowing down in a highly competitive industry. "This whole concept of democratizing software with offerings like Dynamics 365 has helped us out quite a bit," concludes Kelly. "It's fantastic that Microsoft has enabled us to take advantage of these great pieces of technology. It's really changing lives."

<https://customers.microsoft.com/en-us/story/kelly-roofing>