

## CUSTOMER SUCCESS



## Bordner Installation Group Experiences Rapid Return On Investment from Sage SalesLogix

As an industry leader serving the greater Kansas City area, Bordner Installation Group Inc. provides superior products, services, and installations for home owners and businesses through quality materials, excellent workmanship, and exceptional customer service. Originally a roofing company, Bordner Installation Group expanded into windows, siding, and stucco. The company prides itself on its professional and responsive service. The tool Bordner Installation Group uses to help it provide that level of service is Sage SalesLogix.

### Pick the Right Solution

The company began evaluating Customer Relationship Management (CRM) solutions several years ago to replace a largely paper-based system of tracking customer interactions. Tom Mitchell, director of technology services, recalls the situation, “We were relying on paper. Work tickets were written out manually but there was no system for tracking customer details and correspondence. The company’s focus has always been on satisfying the customer, but we didn’t have a system to support it. We wanted something more than sales force automation or contact management. We wanted a system to drive our operations and we found that in Sage SalesLogix.”

Bordner Installation Group analyzed Pivotal CRM, Oncontact, Microsoft CRM, and Amdocs Clarify before ultimately deciding on Sage SalesLogix. “We met with business partners for each product and watched demonstrations,” Mitchell says. “We did our research and even visited the partners’ offices. We feel that Sage SalesLogix is a proven, established product with a great reputation, and the Sage Software Business Partner gave us confidence that they could successfully implement the solution for us.”

### Capitalize on Critical Business Information

Dashboards within the software provide a single location for instantly accessing sales reporting information critical to the company’s success, such as top opportunities, closed deals, and current sales standings. “The sales managers’ dashboards are updated as new opportunities come in,” Mitchell explains. “They assign the opportunity to a particular sales representative and it will then display on the representative’s dashboard.”

#### Customer:

**Bordner Installation Group Inc.**

#### Industry:

Construction

#### Location:

Raytown, Missouri

**Number of Locations:** 1

**Number of Employees:** 125

**Number of SalesLogix Users:** 30

#### System:

**Sage SalesLogix**

### CHALLENGE

Bordner Installation Group relied primarily on paper to track its projects and had no established system for tracking the details of customer interactions.

### SOLUTION

Sage SalesLogix was selected for its extensibility, rich feature set, and proven reputation. It now serves as the hub of operations for Bordner Installation Group.

### RESULTS

Sage SalesLogix contributed to a 17% increase in sales and is directly credited with \$1 million of that increase. Bid turnaround time reduced from one week to 5 minutes. Quality is up thanks to the ability to target areas for improvement.

### Automation Builds Quality and Efficiency

The company's bidding process used to be paper intensive as well, but the inherent customization capabilities within Sage SalesLogix enabled the company to create an electronic version of its bid form. Now, the estimators enter their measurements directly into the software which performs the necessary calculations to arrive at a bid amount. "With the paper system, we had errors in math or omissions in materials," Mitchell says. "By automating the process we are generating bids faster and more accurately."

Mitchell continues, "We've eliminated paper at every turn. Our bid information is entered directly into the software. All customer information is stored in Sage SalesLogix, so we've eliminated the hunt for the customer's file."

Perhaps the most significant benefit of its CRM solution is the dramatic reduction in bid turnaround time. Bordner Installation Group equipped each of its trucks with a laptop computer and printer mounted in the cab. While still at a customer's location, the salesperson enters in the measurements into the Sage SalesLogix bid sheet and produces a professional, accurate estimate on the spot. "Our bid turnaround time has gone from a week to five minutes," says Mitchell.

Workflows established within the software help ensure consistency and profitability. "We have built-in quality gates to prevent staff from advancing a lead to the next step without all the preliminaries in place," explains Mitchell. Sage SalesLogix calculates a job's expected profit as the bid sheet is filled out. If the profit is within the company's desired range, the bid gets a green light. If the expected profit is below a set threshold, the salesperson must seek approval from a manager before proceeding.

The business cycle is completed when the crew completes a job, the actual quantities used are entered into Sage SalesLogix, and an invoice is generated and mailed to the customer.

### Improve Quality of Service

The quality of service at Bordner Installation Group also receives a boost from Sage SalesLogix. The company sends quality

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control personnel to inspect each job upon completion. Staff enters the results of the evaluation along with feedback from a customer survey into new fields Bordner Installation Group has set up in Sage SalesLogix. "We analyze that information to help us improve the overall quality of our service," Mitchell says. "We can identify a crew that may be weak in a certain area and give them the appropriate training."

### Million Dollar ROI

Sage SalesLogix is doing more for Bordner Installation Group than increasing its efficiency and boosting quality—it is helping the company close more deals. "In the year after we implemented Sage SalesLogix our revenue was up 17 percent," says Mitchell. "Conservatively we credit a full third of that increase—about \$1 million—to Sage SalesLogix. The system paid for itself in about three months."

Mitchell concludes, "The extensibility of the software allows us to make it our own. Sage SalesLogix helps us take care of our customers. When you take care of your customers, revenue takes care of itself."

If you would like to learn more about Sage SalesLogix, please visit [www.sagecrmsolutions.com](http://www.sagecrmsolutions.com) or call 1-800-643-6400 to speak with a representative today.



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