

# Project-base Case Study

## Polyroof Products Limited



Polyroof are one of the UK's leading suppliers of cold applied, liquid roofing systems. Their flexible, highly durable, and totally waterproof membranes are extensively used in new build and refurbishment projects throughout the UK. Through the cold application of their roofing materials, Polyroof can boast less disruption and fewer safety considerations upon the installation of their products.

Polyroof is a well-known and respected name in the flat roofing industry with over 100 local authorities now specifying their systems, together with major housing associations, banks, airports, breweries and other industrial and commercial organisations throughout the UK. Likewise in the domestic market, Polyroof has brought peace of mind to thousands of homes by providing a permanent solution to persistently leaking roofs. Over six million square metres of Polyroof have been laid since the company was established in 1984.

Polyroof Products Limited operates throughout the UK, via a field sales team and national network of accredited Contractors.

### The issues

Upon approaching KMS, Polyroof ran their sales and marketing functions using a combination of computer databases, Excel spreadsheets and paper 'visit reports' – none of which communicated with each other. Instead, as enquiries and specifications were received into the office, new spreadsheets were created and notes passed to other departments requesting information packs be sent out. The information contained within the office-based database was limited to customer and prospect addresses, along with huge notes fields containing general information gathered by the field sales staff. Field sales staff were forced to rely upon their own paper records, for both the chasing up of incoming leads and the maintenance of their own prospect/customer information.

Often enquiries would be received requiring lists of Approved Contractors within certain areas. The process necessary to supply such lists was time-consuming, involved retrieving data from a variety of sources and manually typing the required information into a letter template. As the business grew it became increasingly difficult to track down relevant information or to check on a project's status, without pulling information from a number of different locations.

Polyroof put a lot of effort into their marketing activity, yet with the systems currently in place, it was impossible to make informed judgements as to the effectiveness of individual marketing campaigns. Furthermore, the handling of enquiries and specifications was clumsy, time consuming and difficult to effectively manage. Specifications had to be manually tracked and 'actioned', making it difficult to share prospect information with the external salesforce.

### The requirement

Polyroof wanted to put in place a system that offered a number of features: -

- Centralised database – one view of the customers / prospects
- Field sales staff to have local access to their customer and project records via laptops
- Incoming enquiries to be logged, with suitable and consistent 'actions' established
- Approved Contractor tracking and simplified list creation
- Automated mail-merge for information packs and Approved Contractor letters
- Analysing of campaign effectiveness
- Monitoring of win / loss conversion rates

## Implementing Project-base

Polyroof selected Project-base as the perfect answer to their specific needs, meeting each individual requirement and providing a scalable solution that can grow with the company.

Project-base was installed at the Flint office in 2002, with the KMS Technical Team providing Installation and Consultancy services as well as detailed Supervisor Training. Polyroof's external Sales staff were then able to begin working remotely on laptops, synchronising their data with the office database. Three concurrent users, within the Polyroof main office, could now access data held on the central server.

## The benefits

Prospect details along with project and specification information, are keyed directly into Project-base allowing future actions to be established for office and remote field staff alike. As staff log into Project-base at the start of every day, these actions are brought to their immediate attention: giving all users access to the up-to-date information regarding their customers, including key specifications, call history information, Project tracking details and marketing source information.

**“No more post-it notes, customer information is keyed in once and relayed to the Sales Team efficiently - without any errors”**

Polyroof's field Sales staff are now in a strong position, ensuring their day-to-day activities are fully logged and weekly call planning is now entered into the Project-base, thereby reducing the amount of administration and paperwork. Thanks to the synchronisation of data between the office and their remote laptops, all Sales staff are able to follow up their leads expediently and in the full knowledge they have not 'missed' any opportunity.

Polyroof are maintaining their list of Approved Contractors within Project-base, not only giving them the ability to link Contractors to projects but also to mail-merge geographically-specific Contractor lists to their prospective customers, instantly. This has led to huge timesavings, as well as simplified administration routines.

**“It's hard to imagine running a Technical and Sales department efficiently without KMS”**

Having used the system for a couple of years now, Polyroof have built a substantial database of customers and prospects. With this data in place they are now in a position to analyse their performance, via the built-in Project-base reporting, how effective their individual marketing initiatives have been. They are able to analyse the response rates from each campaign, show the current status of all the projects resulting from it and even illustrate how much income a campaign has contributed to the company's annual turnover.

By the use of classifications within the database, Polyroof are able to view exactly how many prospective projects their products are currently specified on, as well as those of their competitors. Thus allowing them to accurately forecast their specified projects and then push approved Contractors onto them. The data held within Project-base also gives Polyroof a clear view on the entire market and the ability to calculate their market-share accordingly.

KMS have assisted Polyroof in making the most of their system and have offered on-going advice as to its use and its possible future development.

**“Information is the key to running any sales business, whether you're the man on the road or the sales director. KMS provides you with the complete picture to help make the right decisions”**

Nick Roberts, Director, Polyroof