

SKY PRODUCTS

{ a method:CRM success story }



Overview

Across 6 years, Dave Kowch has built Sky Products into one of the largest distributors of S-5!® products in Canada. As the largest S-5!® distributor in the country, roofing and building manufacturers rely on Dave's team to properly design and engineer solar panel arrays to snow retention systems.

Learn how with Method:CRM, Sky Products:

- Reduced order processing time by over 50%
- Grew revenue 20% year over year with cloud-based inventory and customer management
- Gained insight on product sales with customized business reports

The Challenge

Since maintaining inventory is a crucial part of Sky Product's success, Dave sought a CRM that not only offered contact management, but was also able to sync transactions and data from QuickBooks Desktop.

Initially, Dave found a generic CRM that promised to provide seamless QuickBooks integration. Upon introducing the new software to his team, he began encountering numerous problems with data integration. To send any estimate or invoice, Dave's team relied on a co-worker's QuickBooks access to get the job done. He also lacked insight on inventory count; a crucial aspect of his business.

Most importantly, Dave realized his team needed to move on from their "archaic" CRM to a cloud-based solution. Their previous CRM ran on a single computer in his office and inputting or accessing information was impossible once anyone stepped out. This posed a real challenge for Dave whenever he stepped out of the office and for his sales rep who was frequently on the road.

The Solution - Method:CRM

Sky Products switched to Method:CRM 3 years ago and hasn't looked back since. With Method's QuickBooks sync and customizable interface, Dave's team manages customers, vendors and inventory on one platform.

Business Benefits

Easier Customer and Vendor Management

Method's bi-directional QuickBooks sync allows Dave's team to reduce over 50% of their order processing time. Without waiting for QuickBooks access, his team is able to immediately follow-up with customers with a quick estimate or send a purchase order to a vendor.

While away from the office, Dave is able to check up-to-date opportunities and sales reports, even on his phone when he is on vacation. He summarizes that “the flexibility of Method is that you can use it anywhere.”

Inventory Management and Customized Sales Reports

Sky Product’s previous CRM software was unable to support the business in managing inventory. With Method, Dave is able to easily manage S-5!® product stock by checking which items customers have ordered and what quantity is currently on order. Since Method syncs all QuickBooks data bi-directionally, his team is able to receive up-to-date inventory numbers at all times.

Dave also relies on custom reports to get real-time insight on Sky Product’s sales performance, including sales and marginal profit by product, and a snapshot of sales by province. He progressively builds new reports with Method’s Professional Services team, based on accumulated data insight. “What we have now is a good reflection of our business,” Dave explains. “As we see that, we’re also looking to drill down more.”

Sales Pipeline and Opportunity Management

With Method’s Opportunities feature, Dave easily manages potential sales and assigns tasks to his team. “We’re tracking them throughout the whole process,” Dave notes. “I’m managing opportunities from sending a quote, to closing a sale.”

Dave also frequently uses Method’s sales leaderboards to see detailed data on both his won and lost opportunities. With this insight, he is able to constantly improve customer management by understanding in detail how sales opportunities are lost and gained.



About Sky Products

Sky Products is an Ontario-based company that specializes in standard and customized snow retention solutions utilizing S-5!® products. Sky Products was born from a discussion while sitting in a garage to one of the largest S-5!® distributors in Canada.

Learn more about [Sky Products here](#).

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