



CASE STUDY

Roberts Onsite

| CONSTRUCTION



Published By |

 **MAXIMIZER** CRM

Construction Leader Builds Business with Maximizer CRM

Maximizer CRM has provided Roberts Onsite with insight into its business, by effectively tracking project bids, monitoring remote sites, and reporting on win/loss metrics – all through one central database.

Implementation

Maximizer CRM was implemented in early 2011. Roberts Onsite required minimal time to deploy the solution and took advantage of Maximizer Software's Professional Services expertise for setup and training of staff on key features, dashboards and reports.

Business Challenges

- No shared central database or document repository available
- Inefficient and time consuming methods to track and measure status, win/loss metrics and customer success rates
- Inefficient means of tracking, monitoring and measuring bids and contracts
- Inability to see what work was being done through sub-contractors
- Poor insight on the communication between various trades re: project bids, status of bids, sharing and following-up on leads.

Objectives

- Consolidate Excel spreadsheets and reports into one electronic database
- Gain insight into status, win/loss metrics and customer success rates for project bids

COMPANY DETAILS

- **One of Ontario's largest multitrade construction contractors**
- **Process machinery installations, building related services & energy installation projects**
- **Established 1938**
- **Headquarters in Kitchener, Ontario**
- **4 Canadian offices (3 located in auto manufacturing plants)**
- **www.robertsonsite.com.**

- Measure performance of individuals and remote sites, track work by sub-trades
- Enhance communication between trades and ensure follow-up on potential leads.



With Maximizer CRM, we now have a centralized database of all of our project bids, drawings and purchase orders plus our management team can easily forecast man power trending and monitor our satellite offices by utilizing Maximizer’s dashboards. Maximizer has exceeded our requirements - we are now a more efficient company and have better control of our pre-construction activities in all of our regions.

DAN MOORE

Senior Vice President, Roberts Onsite Inc



Results

- Shared database of bids and documents provides timely information and tracking
- Increased visibility into industry sectors and win/loss metrics for project bids
- Reduced reliance on Excel spreadsheets improves efficiency

- Dashboards and reports provide visibility into performance of individuals & remote sites
- Reduced time spent on reporting and administration.

Roberts Onsite – Gaining Critical Business Insights Through Maximizer® CRM

Established in 1938, Roberts Onsite is one of the largest, most respected multi-trade contractors in Ontario. Its workforce consists of several hundred of the most talented and experienced skilled- trades people in the industry, supported by a professional team of project managers, estimators and administrative staff, to meet the needs of a broad range of markets and industries.

From pre-qualifying through to completion, the company provides planning, budgeting, safety coordination, project management, multi-trade construction and maintenance support for process-driven, building-related, or energy installation projects. The company operates 24 hours per day, seven days a week. Its priority is to complete each project safely and on time.

Prior to integrating Maximizer CRM, Roberts Onsite managed its bids and projects manually, relying on Excel spreadsheets and disparate filing systems. The company had poor means of tracking bids, managing its sales opportunities, monitoring its win/loss performance, or efficiently generating reports. Maximizer CRM has enabled complete tracking of bids and has provided executives with accurate metrics and reports to make timely decisions that affect business performance.



With Maximizer CRM, at any given time our managers can just click a button to see the key metrics they need, as opposed to someone manually creating graphs and charts that could take days.

BARB WILHELM

Communications & Marketing, Roberts Onsite Inc.



Maximizer CRM – Business Intelligence at a Glance

Robert Onsite needed a solution capable of managing its bids, tracking employee and remote office performance and consolidating related communications through one central location. Barb Wilhelm, Communications and Marketing, explained, “We looked at a few other options, but nothing could meet all of our needs. Then the Maximizer Software team showed us that we could easily configure Maximizer CRM to tailor it specifically to our business, including customizable field labels, dashboards, column views and formula fields.” Management was also impressed by Maximizer CRM’s easily configurable dashboards and reports for visibility into key metrics, while the administration team liked its ease of use, user-defined fields and flexible search functionality.

Taking advantage of Maximizer’s Professional Services team’s expertise, the Roberts Onsite staff attended a few private training sessions that were set up with remote access for convenient participation. The sessions focused on setting up dashboards for those that need to monitor key metrics at a glance; from the company’s administrators through to its president. Wilhelm commented, “Maximizer CRM is extremely intuitive and easy to learn. I am continually learning new things that it can do, that I never even thought of in the beginning.”

Maximizer CRM is now considered critical to the company’s success, with staff inputting all bids, contacts, bid values, which estimator is involved, current status, etc. into one centralized database. The staff agrees that it’s now much easier and efficient to create and submit project bids. The pre-construction sales coordinator has detailed insight into bids, as well as a snapshot of where the company’s strengths lie in terms of estimates and submission of final bids. This provides accurate forecasting on the potential to win bids that was not available in the past.

Maximizer CRM also generates the Daily Bid Schedule, with the click of a button, as opposed to someone manually typing it up and sending it out to the managers. This saves several hours each day, freeing up administration to focus on other priorities.

Wilhelm explains further, “Bidding on projects is one of the most important aspects of our business. If we don’t bid accurately, we don’t make money. Maximizer CRM allows us to streamline and track all of our estimating processes and view a complete bid history, including current/active bids, on each of our customers. We also have insight into the bid opportunities each customer has provided us over the years.”

The management team and sales department rely on and benefit the most from Maximizer CRM, allowing them to track upcoming work to evaluate their manpower needs. Senior management used to spend a significant amount of time focusing on pending bids and determining who to manage them when won. Maximizer CRM allows the company to record information on estimates lost, saving time and money by allowing visibility into trends based on past dealings with a given customer. Declining to quote where customers are unlikely to order, frees up resources to focus on those that are more likely to lead to revenue for the organization.

Business intelligence and access to estimate information are two areas where Maximizer CRM has had the greatest impact on the organization. Stated Wilhelm, "Overall, the most significant benefit to using Maximizer CRM is that management is in touch with what our remote sites are doing, as well as staff at the main office. They can look in Maximizer CRM at any given time to see what each of our estimators is working on with the information stored in one central location."

Dan Moore, Senior Vice-President commented, "We required software to help us manage all of our pre-construction activities such as estimates and proposals. With Maximizer CRM, we now have a centralized

database of all of our project bids, drawings and purchase orders plus our management team can easily forecast man power trending and monitor our satellite offices by utilizing Maximizer's dashboards. Maximizer has exceeded our requirements - we are now a more efficient company and have better control of our pre-construction activities in all of our regions."

Wilhelm added, "With Maximizer CRM, at any given time our managers can just click a button to see the key metrics they need, as opposed to someone manually creating graphs and charts that could take days. Maximizer CRM also allows us to see and monitor what our project managers are sending to customers to ensure that standards are met and information is accurate."

Asked about employee satisfaction, Wilhelm explains, "Maximizer CRM has enhanced that too. We all work more efficiently in our roles and there is no longer duplication of work where two people might follow-up with the same person in the past. The sales administration team loves being able to find everything in one spot relating to a given estimate, instead of relying on the project managers' filing system. This makes it easier on the sales department to know who is working on which estimate and if we are quoting a job or not."

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

Our Customer



Roberts Onsite

Established in 1938, Roberts Onsite is one of the largest, most respected multi-trade construction contractors in Ontario. Providing turn-key solutions to serve the needs of a broad range of markets and industries, its workforce consists of several hundred of the most talented and experienced skilled trades people in the industry, supported by a professional team of project managers, estimators and administrative staff.



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