

WELTY BUILDING CO.

www.thinkwelty.com



THE ORGANIZATION

Headquartered in Akron, Ohio and working nationally, Welty Building Co. has served the construction needs of clients throughout Ohio and beyond for 70 years. The company's approach to construction is founded on a willingness to defy doing things the way they have always been done in favor of doing what is the smartest, most efficient, most sustainable, and ultimately the most beneficial for the customer and the community it serves.

THE PROBLEM

Upon completing a restructuring of the company's sales process, Welty found its outdated CRM configuration inadequate to support its go-forward initiatives. The existing system functioned as little more than a contact rolodex, lacking the functionality to support its newer, more robust business processes.

"It was a complete overhaul systematically from top to bottom, from upper management to our sales personnel," says Tammi Nagucki, marketing communications manager for Welty, of the internal change. "We needed to translate that process to our CRM process."

This would require not only a new CRM solution, but a cleanup of their existing data. Containing a large number of data points, the information contained within their database was at times disjointed, incomplete and/or stale. The wealth of data required for construction projects also served as a barrier to consistent sales utilization, with staff dissatisfied by the tedious data entry requirements.

Welty turned to long-time partner TrellisPoint to develop a streamlined solution, with a strong focus on sales usability.



Welty Building Co. serves the construction needs of clients like the Pro Football Hall of Fame. Welty successfully completed the largest expansion and renovation project in the Hall of Fame's 50-year history in time for its anniversary celebration in the summer of 2013, and completed construction of its Tom Benson Hall of Fame Stadium in 2018.



THE SOLUTION

Working with Welty's sales leadership and marketing teams throughout a number of discovery sessions, TrellisPoint defined each stage of the company's updated sales process to uncover existing limitations and opportunities for improvement. The team then proposed and implemented a new CRM solution that focused on:

DATA CONSOLIDATION

TrellisPoint confirmed what prospect information was critical to Welty's operations to move a project through the sales process, eliminating extraneous data points to significantly simplify the data gathering and entry process for Welty's sales staff. They also eliminated redundant entry points to promote a single system of truth across the organization.

RELATIONAL ORGANIZATION

Moving beyond simple contact management, TrellisPoint also built relationships within the database to organize information by project. Reflecting Welty's day-to-day operations, this more effective system of organization gives staff across the company's four locations multilateral insight to leverage crossover of expertise and connections.

WORKFLOW AUTOMATION

With information cleaned up and organized, TrellisPoint then configured automated workflows and notifications within the system to streamline what were once manual processes with room for human error or delay.

For example, when a construction project is set to "Go" within Welty's new CRM system, the company's operations team now gets a notification to secure contractual and procedural documentation critical to move the project forward. Then, when the system perceives the start day of the job further along in the process, it notifies this same team 30 days in advance to mitigate any scheduling issues or delays.

DASHBOARD VISIBILITY

Arguably most important to Welty's success, however, was the creation of custom leadership dashboards to inform better decision making. From monitoring pipeline projections to overseeing resource allocation, analytics pulled from the new CRM now advise the immediate and long-term management of the business.

THE RESULT

The overhaul of Welty's CRM solution to support the transformation of its sales process has streamlined the way its sales, operations and executive teams do business. Giving a more complete picture of the overall company, Nagucki says the new system has already opened up new doors for its multiple locations to collaborate on projects and expand business.

"It turned out to be a very engaged process, with buy-in from everyone," she says. "TrellisPoint made it the best solution for everybody, it wasn't a one-size-fits-all product. Furthermore, we were able to create a custom platform to coincide with our new process without disrupting our sales force – which remains a very big deal for us with sales across the country."

