

Kivlan Group

Overview

Kivlan Group is the outgrowth of the Hal Kivlan Sales Agency founded in 1968. The company remains focused on executing the original business plan: to build strong industry partnerships with leading manufacturers, distributors and contractors, to provide a comprehensive portfolio of services and products to maximize the synergy between both for the benefit of customers.

The primary goal: to be a gateway for greater customer profitability. Services include strategic planning, personal selling, instructional training, market intelligence, targeted marketing campaigns, telemarketing,

customer surveying, and custom reporting, among others. Kivlan Group also markets service tools and components to distributors and contractors. It is also the exclusive distributor for RGF Environmental Group, who designs, develops and builds standard and custom environmental systems.

Specializes in working with HV/AC, refrigeration and plumbing contractors and distributors in the Mid-Atlantic states, providing sales management & market planning to meet customers' business objectives and increase profitable sales. Microsoft Dynamics CRM hosted by Beyond Impact provides a cost-effective customer management system for comprehensive tracking and management of sales, sales team performance, and management of marketing programs.

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Kivlan Group needed a simpler, more cost-effective way to manage customer relationships than running the software in-house. The in-house system consumed too much time and money contacting and scheduling consultants to address problems – which typically resulted in the initial problem getting solved at the expense of creating additional problems that impacted company performance.

Client Challenge

Kivlan Group's business model is based on knowing its customers, what they need, and how well the Kivlan team is doing in addressing their needs in providing outside sales services and support. It's all about delivering results.

Which naturally makes CRM a strategic system for Kivlan. But it's critical that system performance is exemplary, that issues and problems are addressed immediately – and that it is a cost-effective solution. "We got tired of always having to schedule IT people to fix our problems," says Brad Kivlan, CEO. "We were spending a lot of money for consultants. They'd fix things," he said, but invariably "created new problems in the process. IT ended up being the second largest demand on my time – after accounting."

"We crunched the numbers and it was clear that it was better financially to go with a cloud-hosted solution, rather than running servers in house."

Benefits

- Reduced cost and time required to manage IT
- Superior IT support
- Reliable data security and access
- Improved uptime
- Single customer data repository
- Comprehensive aggregation of data
- Insight into new market opportunities
- More time to mentor and implement strategic plans

"The time and money you can save with hosted cloud services is extraordinary. It's an incentive to find other ways to streamline your business."

- Brad Kivlan, CEO

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Solution

Kivlan got a recommendation to consider Beyond Impact as a hosting service provider. Brad Kivlan had some initial concerns about security and reliable access to the company data but was assured by Beyond Impact that they wouldn't be a problem. "We crunched the numbers and it was clear that it was better financially to go with a cloud-hosted solution, rather than running servers in house," he says.

The company elected to stay with Microsoft Dynamics CRM, the solution it already had experience with and that met the company's needs. The system provides out-of-box functionality that supports sales, marketing, and customer service. It provides a central repository for all customer data and enables data aggregation into whatever format is needed to gain insight and better manage customer requirements. It helps the company in tracking performance-to-goals of every member of its sales team.

Results

Security and reliable data access have been exemplary. Upgrades to the system are seamless. "And whenever we have a problem, Beyond Impact takes care of it. When they say it's complete – it's complete, without causing any other problems," Kivlan says.

Kivlan Group extensively uses all features in the system. "Especially marketing lists. And we use the account function to segment customers in numerous ways. We attach numbers to the accounts and track sales in detail."

Brad Kivlan says they mine the system for discovering additional product opportunities. "And to make sure that our customers are happy with our performance."

Going with Beyond Impact as a hosted service provider has been such a positive experience that it's created

a 'domino effect.' "We're moving everything to the cloud. We've gone paperless, which has been a great saving in overhead," he says.

"We're absolutely convinced that the cloud is the way to go. It's so much easier, especially for small companies," Kivlan states. "There's less headache, less cost, and less downtime." In addition to eliminating IT as a primary draw on his time, the company has also outsourced accounting, the other major activity that consumed time.

"My two largest issues have been eliminated. I have time now to do more coaching with everybody on my staff. I have more time to work on business development in new markets. I have the time to be faster in implementing strategic plans that can help our company grow."

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