📄 **Customer Success Story**

Customer Success Story: How Jordan Lee Benefited from Working with NimbusCRM

Client Information
 Name: Jordan Lee
 Company they worked with: NimbusCRM
 Email: jordan.lee@summitroofing.ca
 Service/Product: CRM and job scheduling software for roofing companies

The Challenge
Before NimbusCRM, we were juggling leads in spreadsheets and sticky notes. Follow-ups slipped, estimates got delayed, and jobs were sometimes double-booked. We needed one place to track every lead, every appointment, and every quote without extra admin work.

The Decision to Work With Us
We chose NimbusCRM because it looked simple enough for our crew to actually use. The pipeline view, automated reminders, and mobile access were the big selling points. It felt built for a trade business, not a giant corporate sales team.

The Process
Onboarding was quick. We imported our current customers, set up stages for new leads, and connected our calendar. Within a week, every new inquiry was logged automatically and assigned to the right person.
What stood out most was the follow-up automation. We set templates for texts and emails, so leads get nudged without us constantly remembering to do it. The mobile app also makes it easy to update notes from the truck.

The Results
We're responding faster and losing fewer leads. Quotes go out sooner, and scheduling is cleaner. It's also easier to see what's in the pipeline, so we can plan crews and materials ahead of time. In the first month, our average response time dropped from about a day to under two hours. We've also saved around 6 hours per week in admin work, and our close rate is up roughly 15%.

Final Words
If you're a service business that's tired of messy tracking and missed follow-ups, NimbusCRM is worth it. It keeps everything organized without being complicated.
The setup was straightforward, and support was responsive when we had questions. It feels like a tool we'll keep using as we grow.

Want to see similar results? Contact NimbusCRM to learn how they can help.