



Egan Company builds a single source of truth for customer relationships.

17 teams

utilizing Copper CRM

89% adoption rate

achieved through grassroots efforts

14 active pipelines

being tracked

Egan Company

Since 1945, Egan Company has served Minnesota and the greater Midwest region as a specialty contractor and systems integrator. Egan has grown to become Minnesota's largest single-source partner, generating around \$280M in revenue annually.

To initiate, build, and maintain strong customer relationships, Egan needed to focus on establishing seamless internal communication processes. With nearly 1,000 employees covering 12 specialty trades — and about 700 of those in the field at jobsites — keeping everyone on the same page was a tall order.

To uphold its mission to provide exceptional service and craftsmanship as the company continued to grow, the leadership team focused on simplifying access to customer data and streamlining the information-sharing process across all operating groups.

We spoke with Egan Company's Director of Marketing, Jessica Johnson, on how Copper is helping them deliver a single source of truth throughout the entire enterprise, no matter where the jobs take them.

Cracks in internal communications

As a large regional player in the trades and construction business, Egan needs to keep multiple business operating groups running smoothly at all times to drive continued success for the company. Flawless communication is at the heart of these operations, from responding to service calls quickly, to keeping customer touch points up to date, to tracking opportunities in the pipeline.

Six years ago, Egan relied on Microsoft Dynamics as its customer relationship management (CRM) platform, but once the company made the switch from Microsoft to Gmail, this enterprise-wide CRM became obsolete. With Gmail at the center of the teams' internal and external communications, Egan needed a CRM that would seamlessly integrate with Workspace (then G-Suite). "Efficiency is critical, and that's what made the integration with G-suite so important," Jessica explains. "We didn't want users keying information in manually anymore, and we wanted the AI piece of pulling data automatically from Gmail."

Another important consideration was transparency. As Egan continued to grow, a lack of visibility into customer relationships and individual touch points became a bigger problem. Without a single platform for internal communication between teams in real time, important customer information slipped through the cracks, becoming trapped and inaccessible in individual notepads or email inboxes. "It was the internal piece that was missing — the cross-departmental communication happening with customers that are beyond a project or beyond a sale — that we wanted to make sure everyone knows about," Jessica recalls.

Not only did Egan need to find the right solution, but the company needed to educate its workforce on the importance of using a CRM as their "Bid Board," a single source of truth for all things related to opportunities, sales and customer communication. And with over half of the employee base completely unfamiliar with CRMs, ease-of-use was a must to help improve adoption rates.

Plus, the 14 different pipelines that needed managing and 17 teams involved in interconnected business functions meant that any potential CRM also had to be flexible and customizable. Each team has distinctly unique operational processes, relying on different vendors and forms of communication, but activities still needed to be visible to other teams to ensure a smooth customer experience. "Our teams operate uniquely, especially on pipeline management, so we needed to be able to customize. We aren't master programmers, so we needed to be able to do it without a technical background."

Finally, four years ago, Egan landed on Copper as part of an executive initiative to improve internal communication, heighten visibility into customer information, and increase operational efficiency. And the platform has made quite an impact on the business since then.

Closing the gaps with Copper

With the company-wide goal of preventing customer interactions from falling through the cracks, it was critical that Copper be adopted across the enterprise as a central hub of information. But that also meant people had to adopt a new tool and modify their workflow.

For the first two years, Jessica's team faced more resistance to adoption than anticipated. But Egan stayed the course, understanding the importance of users getting comfortable on the platform at their own pace. "It just took time for a user themselves to realize how easy it was," Jessica notes, adding that the company had a grassroots strategy from the very beginning instead of demanding compliance. Several "super-users" also helped spread the word, championing Copper internally at every opportunity. The company's message to employees? "We want you to realize for yourself how it's going to positively impact your role."

And with time, they did. Soon, a number of Copper champions emerged within Egan, including its Director of Sales, who promotes it like crazy because of how much value he gets from it on a daily basis monitoring current opportunities and bids in progress.

Jessica's team also dedicated one-on-one time with individual users to show them the simplicity of Copper, with a specific focus on its convenient integration with Gmail, a familiar and comfortable tool they already used extensively.

Once the various teams were on board and actively using Copper, they were able to work together and improve communication for five common uses across each operating group's own custom pipeline:

- Opportunity management for monitoring proposals or bids in progress
- Contact interaction and account management for tracking communication touch points and interaction history
- Vendor interaction through tagging vendors by different categories to easily view a history of vendor transactions and know who to order different products from
- Targeted marketing and outbound sales to support ongoing ABM and prospecting efforts
- Reporting to track key metrics for each operating group

Jessica's team also releases a monthly one-pager, sending the entire company a meaningful monthly "snapshot" report of Copper activity from across the customer lifecycle. These reports have the dual effect of providing valuable insights into Egan's business and keeping team members invested in using Copper. When managers showcase the successes they're tracking with Copper, it encourages a spirit of friendly competition where others want to see their successes highlighted, too.



Results beyond numbers

Egan's success with Copper goes back to what the team was originally searching for when it chose the CRM solution 4 years ago: internal communication and efficiency. "Paired with our newly distributed workforce, we really have valued fostering long-term relationships, both internally and externally — we've found great value in Copper as a communication resource," Jessica says. "For us, the value really lies in efficiency and communication, in addition to sales forecasting."

Two areas where Copper has particularly shone for Egan are in its on-the-go usability and flexible integration with the company's other key technology.



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Egan Company's Director of Marketing

Copper's mobile app builds a better workflow

Pre-pandemic, Egan already had a distributed workforce, with project managers, engineering and other supporting roles in various offices as well as teams working in the field at jobsites. With lockdown further dispersing the office teams to their homes, Copper's mobile app helped Egan team members stay connected.

This hybrid work structure met its share of hiccups, with employees working at jobsites more vulnerable to COVID-related impacts on their work. But throughout the interruptions, Copper remained the central hub where all customer-facing team members could stay up to date on customer activities.

"The biggest impact that Copper has made is when our team is on the go: users can easily update a record in real time when they have the information," Jessica remarks. When the Director of Sales is at a jobsite and discovers a new point of contact for an important customer account, he can notify other team members immediately and update the customer contact in the moment, instead of letting that information sit in an email thread. "No one has to remember to send an email to update information after they get back to their workspace."

The mobile app eventually unlocked various use cases for Egan's teams, despite some initial resistance to adding another app on their phones. With time, however, the efforts of Jessica's group have proved successful, and Copper's adoption rates are up to 89% across its 170+ users. Now, using the app is part of people's daily workflow and all new employees have the ability to download it during new-hire onboarding to alleviate their learning curve.

The mobile app has helped Egan:

- Better communicate after-hours maintenance call information to teams
- Log activity on the go and capture every detail in real time
- Access important information during meetings to answer questions in the moment
- Auto-log customer calls from the mobile device, eliminating the need to do so manually
- Prospect and network better by allowing sales reps to see the history for any prospect

Connecting key tools in Egan's tech stack

Though Egan didn't have internal tech resources initially, the company's tech needs have changed since first onboarding with Copper. The team now relies on a number of tools to keep its large operation on track, and connecting those tools to each other is critical to help facilitate the efficiency that the company relies on to drive its ongoing success. Among these are an internally-developed Job Create application, which also connects to the company's accounting system. Getting this tool to integrate with Copper was a must.

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That's where Copper's Open API came in. With Egan's in-house programmer, the company built its own custom integration between Job Create and Copper to help automate a crucial workflow: new job creation.

Whenever a new project is awarded to the company, it triggers the creation of a job in Job Create, pulling all of the contact information and other details in from the Copper opportunity. The assigned user is prompted to add any missing information, and then the software populates the job and also feeds the information into the company's accounting system — eliminating duplicate manual data entry and avoiding missing or incomplete data.

While this type of flexibility may not have been top of mind for Egan's executive team when first choosing a CRM, it has enabled the company to continue to scale with Copper as its technical needs evolved.

Onward with Copper: Promoting a culture of transparency

Whether it's being used at the office or remotely, Copper is helping Egan build better customer relationships with full transparency. Management and executive teams now have 100% visibility into customer interactions. "Prior to Copper, there was no way for individuals to know what was happening across the company. Fast forward to today, we have full visibility into everything." Team leaders can identify gaps in communication and course-correct before it's too late, helping to build strategic relationships that will stand the test of time.

With Copper, executive teams have a holistic view of data that enables better communication and leadership. And since so many teams and members are using Copper, executives have a cross-departmental snapshot of the entire business.



This transparency hasn't just made a difference at the executive level, though. It's helped cultivate a more supportive company culture overall. "It's made us stronger as a team and it's strengthened the culture we have around our customers, the importance of teamwork and the importance of collaboration." It's much easier to approach the business as a team sport when everyone's on the same page and no one gets left in the dark.

Copper CS + Egan: A productive partnership

By approaching its use of Copper as a true partnership, Jessica and her team have helped drive continued success with the platform. They've committed to weekly check-in meetings with the company's dedicated Copper Customer Success Manager and Copper Solutions Engineer as part of the company's Business Plan benefits. Though it requires a time commitment and dedication to meet weekly, Jessica says, "I find great value in everything the Copper CS team does to support and promote all the great work that everyone else is doing behind the scenes. I appreciate having them both as really smart, fun, trusting partners."

The entire Egan executive team also meets with its Copper CS team twice annually for a business review, "as a way to celebrate milestones, discuss ways we can all tap into Copper to grow our business — and support Copper as a company as well." The fruitful partnership helps support Egan's strategic planning and offers opportunities for refining Copper use to support company objectives.



What's on the horizon

As Egan continues to grow, Jessica is looking to improve other business operations with the company's use of Copper, including automating more processes using the Zapier and MailChimp integrations, as well as creating additional reports using Copper's new Reports suite.

Jessica also hopes to refine the company's tagging system for managing vendors inside Copper. With hundreds of vendors in the system, managers need to be able to view the history of vendor interactions to give them additional insights into which vendors to use for each project. But in order to achieve this level of clarity effectively, they need an incredibly granular tagging system based on product type, from door frames to hinges. Jessica intends to put Copper's technology product elements to work for this purpose.

With a partnership built on trust and transparency between Copper and Egan, Jessica and her team are committed to continue improving internal communications and building stronger relationships between customers, teams and vendors as the company keeps growing.



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Build your customer-centric foundation, too

Copper is designed to improve customer relationships without slowing your team down. See what the Google-recommended CRM can do for your team.