

Company

SIR Glass

Industry

Auto Glass Service

URL
www.sirautoglass.com
Sales Process

 Offline Service
(multi-step)

Applications Replaced

 Google Spreadsheets,
Google Forms, Manual
Entry/Update


SIR Glass

SIR Glass is an auto glass repair company raising the standards on quality, customer service, and trustworthiness. Based in Portland, Oregon, they provide windshield and auto glass services covering the 8 surrounding counties and cities.

*“Referral Rock is exactly what EVERY software company should strive to be. Their integrations, their obsession to be on the leading edge, the customization and flexibility, WITHOUT being locked into a long-term contract. They’ve saved me **hours of manual work each week and thousands of dollars.**”*

Shaun Dewitt
Owner

Challenges

- SIR Glass already had a referral partner program in place, but it was too manual, too complicated to manage, and couldn’t scale
- Didn’t provide any tracking or transparency to their partners
- Distributing gift cards was a nightmare even though they handled these all online

Solution

- SIR Glass replaced their Google spreadsheets and Google Forms by creating an integrated referral program that connects with their CRM system (Service Mate)
- Created a professional, transparent experience for their partners to refer and track referrals
- Automated reward fulfillment (switched to PayPal because better aligns with Partner’s preferences)

Results

- Saves 3-4 hours of manual work each week through automation
- Generates over 30 new referral sales each month

What’s Next

- Continuing to scale to other partners and expand their referral member base
- Build out customer referral program

Invite

- Relationship focused. Shaun (owner) or other staff ask partners to join the referral program
- Created laminated cards with easy instructions to guide people in joining

Share

- Direct referral add for easy tracking and information sharing
- Mobile responsive design to make it easy to access on mobile
- Uses statistics to key partners up-to-date with referral status and rewards

Action

- Provides a professional (more concierge) service
- Relies on partners to sign up new referrals via direct add
- Partners adds referral (pending)
- Referral gets a quote and is updated in Service Mate (change Referral Status to qualified)
- Referral purchases the service and is updated to approved (done automatically based on change in Service Mate)

Rewards

- PayPal based rewards depending on which service the referral purchases (\$10 for Chip Repairs, \$20 for Cash Replacement, \$40 for Insurance Replacements)
- No Referral reward

Integration

- Zapier to integrate Referral Rock and Service Mate (their CRM) through a multiple step sales process. Referral's status is updated in Referral Rock as they move through the Service Mate workflow.

Top Tip:

Referral Rocks customer success team is outstanding. Make sure you get help setting everything up the right way from the beginning, so you can have a system that scales when rolling out to new members.