



From Spreadsheets to Scale: How Dickinson Roofing & Construction Runs a Smarter Operation with Zuper

Dickinson Roofing & Construction is a family-owned residential and commercial roofing company based in Sedalia, Missouri. Founded by Brian Dickinson, the company has built a strong reputation across central Missouri for quality workmanship, insurance claim expertise, and a deeply personal approach to customer service. They offer roof replacement, repairs, inspections, gutter installation, and emergency services, and have earned recognition as Missouri's #1 rated roofing company.

Like many growing roofing businesses, Dickinson Roofing reached a point where their tools weren't keeping pace with their ambitions. Managing production through a patchwork of software, spreadsheets, and disconnected systems, they knew something had to change. That's when they found Zuper.



The Challenge

Before Zuper, Dickinson Roofing relied on a legacy CRM system— and while it handled the basics, it created as many problems as it solved.

Scheduling was flying blind. The dispatch board in their old system showed that a job existed, but not much else. There was no easy way to see a job's size, pitch, complexity, or production status at a glance. To compensate, the team built and maintained a separate scheduling spreadsheet to capture what the software couldn't — a time-consuming workaround that introduced risk every time information needed to be transferred between systems.

Upsells were being left on the table. When building quotes, sales reps were mentally filtering out premium options before even presenting them to homeowners. Reps would default to the lower tier packages, assuming customers wouldn't want the upgrade. The result: premium products like Owens Corning Flex Shingles were rarely sold.

Field documentation was disorganized. Notes lived in the old CRM but photos lived in a separate photo management app. Neither talked to the other particularly well. Running a smooth, fully-documented job — where anyone could look at the record and understand exactly what had happened — was nearly impossible, even with experienced crews.

A previous CRM implementation left scars. Chris Little, who manages operations for Dickinson Roofing, had been through a failed CRM rollout at a prior company. That experience — no video calls, poor email support, and being left to figure everything out alone — made him deeply skeptical of any new platform launch, especially one supported by a remote team.

Finance ran on friction. Payment tracking happened through a separate banking portal. Receipts came in as a pile of paper that someone had to manually sort, input, and attach to the right job. The finance manager was making a trip to the bank every single day just to deposit checks.

What Zuper Enabled

Dickinson Roofing went live with Zuper and — within just two months — the impact was already visible across every part of the business.

An Onboarding Experience That Actually Worked

Chris Little's apprehension about the remote support team evaporated quickly. Where a previous CRM rollout had meant no video calls and poor email responses, Zuper delivered weekly video calls, fast system updates, and rapid custom configuration. The Zuper team built out specific workflows for Dickinson's processes quickly and responsively.

“ The communication has been great. Whenever we've had questions, you guys have gotten back really quickly. Fixing issues has been pretty quick. I mean, it's honestly pretty amazing. ”

-Chris Little, Office Manager

The contrast with prior CRM experiences was stark enough that Chris identified it as one of the most powerful parts of the Zuper story — the fact that onboarding a platform of this scale didn't have to be painful.

Intelligent Quoting That Sells for You

Zuper's Intelligent Quoting module changed the estimating and quoting dynamic entirely. Instead of reps selectively offering options based on what they assumed the homeowner would accept, every quote now automatically presents a "good, better, best" tiered package. The sales rep doesn't have to make a judgment call — the structure does it for them.

The result was immediate and measurable. In Q1 the team sold more projects with Owens Corning Flex Shingles — a premium product — as was sold in the entire previous year. Dickinson is on track for a 4x increase in premium product sales, driven not by hiring better salespeople, but by removing the friction that was getting in their way.

“ Before, the sales guys wouldn't have even offered it. But it was part of the package, and the homeowner was like, 'actually, that's only a little more a month — I'm going to do it. ”

-Chris Little, Office Manager

A Dispatch Board That Replaced a Spreadsheet

The customizable dispatch board in Zuper eliminated the separate scheduling spreadsheet entirely. Each job card now surfaces the data that actually matters for smart scheduling: production status, job size in squares, main pitch, number of stories, and decking condition — all at a glance.

This intelligence enables the team to group jobs geographically, estimate crew time accurately, and slot repairs and warranty work alongside nearby full jobs in a way that was simply impossible before.

“ Before, we would have to use a separate spreadsheet that would have all this information, build it out on the spreadsheet, and then schedule it out in our old CRM. Now we can see all our warranties and see which jobs our crews are doing and what areas they're in and schedule those alongside other jobs — which we just never had the capability to do before. ”

-Chris Little, Office Manager



Guided Field Workflows That Run Jobs Perfectly

Zuper's powerful guided workflow system featuring structured tasks, status checkpoints, and documentation requirements – along with advanced AI capabilities like voice notes and AI walkthroughs – has transformed how jobs run in the field. When Dickinson Roofing recently brought on new, inexperienced hires, those team members were running jobs completely cleanly within weeks: nothing missed, everything documented, photos and videos in the right place.

This represents a fundamental shift: the quality of execution is no longer dependent on individual experience. Zuper's structure and AI capability enforces and supports best practices automatically.

“ We hired some new guys a couple of weeks ago and we've fully built out all the tasks and statuses and notes they have to follow. They're basically running jobs perfectly now. We're not missing anything. Everything's being documented. We've never had that happen before, even with experienced people. ”

The AI Walkthrough has been a gamechanger. We can now create a complete job record on-site. It captures all of our photos and notes in one place and it creates a detailed summary that's easy to review.”

-Chris Little, Office Manager

Real-Time Financial Visibility

With Zuper Pay, the finance manager no longer drives to the bank every day — checks are deposited via mobile. Gross profit margin updates automatically on job cards as expenses are added, giving the team real-time visibility into job profitability without manual tracking.

The Zuper AI Expenses feature replaced a manual, error-prone receipt process. Instead of project managers handing in paper receipts for someone to manually sort and attach to jobs, the AI scanner handles it automatically.

QuickBooks integration is in progress, and the finance team is already confident in full automation given how customizable the platform has proven to be.

Lead Intake, Modernized

Dickinson Roofing replaced their external Calendly setup with Zuper's built-in appointment booking system, giving both their cold caller and office team a single, unified tool for scheduling. Their website widget for lead capture is now live — with an instant estimate tool integration coming that will allow homeowners to get a roofing estimate directly from the website, without Dickinson's team needing to be involved.



The Impact

| Area | Before Zuper | After Zuper |
|-----------------------|---|---|
| Premium shingle sales | Limited premium upsell jobs per year | As many jobs Q1 as the entire previous year – on track for a 4X increase |
| Scheduling | Separate spreadsheet + legacy CRM system | Single dispatch board with full job intelligence |
| Field documentation | Split between legacy CRM and photo management app | Unified, guided workflows in Zuper with AI powered voice notes and walkthrough videos |
| New hire ramp-up | Dependent on experience | Running jobs perfectly within weeks |
| Check deposits | Daily bank trips | Mobile deposit via Zuper Pay |
| Expense tracking | Manual receipts, manual input | AI-powered automated scanner |
| Appointment booking | Stand alone calendaring app | Native Zuper booking system |

What's Next

Dickinson Roofing is still in the early chapters of their Zuper story — and already seeing results that surpassed expectations. Zuper Connect is being rolled out to the full team, which will bring call masking, AI-generated call summaries, and after-hours AI response capabilities. QuickBooks integration is being finalized. And the instant estimate website widget is on the horizon.



"It's crazy to think of what's been possible just in the first two months of being live. I'm always someone who likes to make things better, make it more efficient — so I'm excited to see where it could be at a couple of years from now.

Your software blows any software out of the water. I've tested out lots of different CRMs and software. For roofing, this is just the best."

Chris Little, Office Manager

