



## CASE STUDY

# Automation sets fast growth foundations for Concrete Experts.

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Company size: 20+

Industry: Construction

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## The Challenge

Even-mature software can limit fast growth businesses

Concrete Experts is a tech-forward construction business based in Calgary, Canada. Launched in 2014, the business used mature software such as Quickbooks, Estimate Rocket and Jobber to manage estimates, field service, invoicing, and accounts.

Starting out in residential property, Concrete Experts soon expanded its operations to take on commercial property contracts. A higher volume of more complex business relationships

and work orders highlighted the impact of numerous system and process gaps, sparking a review of its IT requirements.

As is often the case with out-of-the-box software, Estimate Rocket and Jobber were not perfect fits for Concrete Experts. Each offered some great features and functions for day-to-day operations, but a lack of system and process integration impacted efficiency, productivity, and service standards as the business grew.

Estimate Rocket lacked a mobile application for system access and quote generation from the field. Jobber did not integrate well with QuickBooks. Data syncing with lead forms from the company website, email and calendar applications was patchy. None provided the job scheduling, tasking and workflow features needed to manage multiple relationships and jobs with commercial clients.



- ● As we diversified our operations, we needed better ways to communicate across different teams, allocate job responsibilities, manage tasks, and build strong customer relationships. We wanted to be more efficient and grow fast, without compromising our service quality.

– Dallin Tagg, Owner & Operator, Concrete Experts

More customers meant more ground to cover in the field, but it was difficult to efficiently schedule customer appointments, site visits and job tasks across different systems. It was even more challenging to effectively coordinate job information and schedules with subcontractors, as Jobber could not be set up to provide controlled access for third parties.

Team members in the field had to return to base to finalise estimates and quotes, creating end-of-day administration backlog and slowing down customer responsiveness. Contract agreements and service terms for commercial work varied from job to job on the same customer account.

Connecting contract documents, estimates, quotes and variances to the correct accounts, jobs, and customer contacts was hard because data was siloed in different systems.

Every new commercial client created numerous additional relationships and customer contact records. Estimate Rocket and Jobber only accommodated single account contacts, creating significant challenges for account set up and tracking customer relationships.

Job volumes were another challenge. Jobber could handle up to 50 jobs at any one time, but during peak periods, Concrete Experts had hundreds of jobs on the go.

Weak integration between Estimate Rocket, Jobber and QuickBooks made it challenging to project transactional and recurring revenues. Data synch issues forced manual re-keying of data between systems, which increased the margin of error on customer invoices, and financial projections.

The manual processes and system workarounds that historically covered such gaps became unsustainable as Concrete Experts continued to grow.

## The Need

- Match or improve on the most useful features and functions in Jobber and Estimate Rocket
- Leverage existing investment and optimise use of any retained software
- Consolidate multiple systems and processes
- Automate estimations, job tasks and workflow notifications
- Improve job scheduling and field service coordination
- Streamline information and data sharing between different teams and operating divisions
- Centralise business data from multiple sources
- Provide real time data synch with QuickBooks Wordpress web forms

- Provide access to systems from the field
- Offer lower total cost of ownership
- Handle a significant volume of jobs and task allocations without compromising system performance
- Simplify the overall user experience for staff.

## The Solution

A rock solid, end-to-end business process automation solution.

The search for more effective systems led Concrete Experts to 365 Digital Consulting, an Australian company with expertise in modern workplace technologies and work order management solutions.

“The immediate focus was to get across which aspects of Estimate Rocket and Jobber were business critical for Concrete Experts. Developing a solution to replace mature software needed carefully considered planning to ensure a successful outcome” explains 365 Digital Consulting CEO, Ehsan Hakimi.

“We invested a month into the initial discovery process with Concrete Experts. What we found was a company that was quite advanced in its approach to technology. Their team came to the table with a lot of detail about their existing processes, and a clear vision of what they wanted to achieve.”



365 Digital Consulting recommended a customised development of a work order management system built on Microsoft Office 365, Power Platform and utilising SharePoint. This would include a custom SPFx solution and Microsoft List.

Building the full solution in the Microsoft stack would leverage existing Office 365 licenses. Implementing Power Platform would allow Concrete Experts to utilise the full capabilities of the Office 365 suite, including Microsoft Teams, SharePoint, Power Automate and Power Apps.

SharePoint would provide a much-needed central repository for all business and customer documentation, with clearly defined information architecture and access controls. Power Apps would be used to develop custom applications to support work product in the field, with Power Automate providing all the functionality needed to trigger 95% of business-critical processes from lead generation to invoice payment.

- ● Power Platform was instrumental to delivering a successful result for the first phase of this project. The experience working with Concrete Experts has enhanced our existing work order management solution knowledge even further, which will assist our other customers and improve our position in the MSP market.

— Ehsan Hakimi, Founding CEO, 365 Digital Consulting

Seven integrated APIs would ensure data flow between all core systems and a drastically simplified, robust and real-time data synch to QuickBooks.

Leveraging the low code capabilities of Microsoft Power Platform meant additional features and functions could be developed on an iterative basis, with sufficient time to develop and test releases with end users.

- ● Working with Microsoft Teams is the most efficient way to communicate, and it allowed our team to have an easy process for discussing a current project. We could discuss what improvements could be made or what new processes needed to be included in the project, while they are working in the field.

— Dallin Tagg, Co-Owner, Concrete Experts

The final solution would meet the specific requirements of residential and commercial accounts and jobs. A fully automated, end-to-end business process.



## Solution Summary

- Implementation of Microsoft Power Platform for automated work order management
- Custom SPFx on SharePoint platform with Microsoft List and extended Microsoft Teams
- Custom mobile application on Power Apps for field system access.
- 7 REST APIs handled with Power Automate
- Integration with QuickBooks Live.
- Customised notification system on Power Automate for editable email content
- Wordpress lead form integration on Power Automate for direct submission to a Microsoft List
- Calendar API for appointment setting, scheduling, and resource utilisation management
- Kendo UI schedulers for job allocation to subcontractors
- Unique project workflows to mitigate effect of 5,000 item limitations on data migration, PNP library queries and search features.

Crayon's channel team supported 365 Digital Consulting with advice on the best licensing structures for Microsoft and guidance on further commercialising their unique work order management solution.

## The Result

Modern business systems help Concrete Experts shine in construction.

In a little over 12 weeks, the first phase to replace the required features and functions of Estimate Rocket and Jobber in the new system was complete. Efficiency gains became apparent almost immediately.

The project has highlighted smarter ways to do things better and do better things according to Dallin.

“Working with Ehsan and his team, we came to realise a lot of what we were doing in Estimate Rocket and Jobber could be done in much simpler, faster ways. That matters when you are a small team, and half the team is back-office.”

“The sum of small efficiency gains across a team of 15-20 people adds up. Saving even five minutes a day equates to around \$30,000-\$40,000 worth of time annually that is not spent on manual process management and administration,” said Ehsan. “That is on top of the overall cost savings gained from consolidating software licensing on to a single platform.”

Dallin agrees that IT cost efficiencies were an immediate win for Concrete Experts. “Estimate Rocket and Jobber were well priced but the Microsoft solution we have now is an even lower cost per head. We don’t have to pay for multiple software licenses because we have everything in one place, which is going to be far more effective in the long run.”

Going forward, the team at Concrete Experts are focusing on how the new system can support their fast growing sales team and further improve the customer experience.

“The construction industry is not known for being very evolved when it comes to technology, so we have a real opportunity to shine,” said Dallin. “This solution is great for any small business that wants to be efficient, and effective – it’s perfect.”

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— Ehsan Hakimi, CEO, 365 Digital Consulting



Increase work efficiency  
across 20 staff



Save \$40,000 worth of  
manual labor annually



More responsive to  
customer needs