



KC Roof Plumbing Salesforce Optimisation: The Power of One





Digitising your construction business from end-to-end is not purely reserved for the big end of town. As KC Roof Plumbing discovered, size is no barrier to optimising business with technology.

What does KC Roof Plumbing – a Melbourne-based, small business roofing specialist – have in common with LendLease, John Holland and Fulton Hogan?

While they all operate in the construction sector, KC Roof Plumbing's size and scale is quite clearly poles apart from these tier one contractors. But what they all share is a strategic vision to optimise business operations using technology for the longevity of their business.

And their chosen technology?
It's Salesforce.

The Brief

As Founder and Director of KC Roof Plumbing, Casey Henwood always had a big vision for his small business.

"I started KC Roof Plumbing back in 2013 with just one contractor – myself – because I felt there was a gap for quality and professional delivery in a market not typically known for either."

These days, KC Roof Plumbing employs almost 20 people and delivers roofing solutions for high-end residential and modular builders, re-roofing clients, and other custom projects across the Melbourne region.

For Casey, delivering quality and professionalism isn't just the responsibility of the people and products on a roofing job.

"It's the entire business – it's everything and everyone – that contributes to that ideal outcome".

Including the technology.

But technology at KC Roof Plumbing was not quite where he wanted it to be. Using AroFlo for operations management, Salesforce for CRM, Xero for accounting, as well as countless Excel spreadsheets and Gantt charts to manage everything from sales through to project delivery, Casey was frustrated.

"I kept having to jump around separate tools to manage interdependent parts of my business.

Everything was siloed and as a result, our work was that much harder. I always wanted a system that delivered everything from start to finish, but I didn't know what system could deliver that."



What

End-to-end Salesforce optimisation for construction

Key Requirements

- Business-wide digitisation with Salesforce
- Salesforce CPQ for quoting
- Salesforce integration with Xero for accounting
- Replacement of AroFlo operations management software

Our Approach

Little did Casey know that the solution to manage his business end-to-end was already there in front of him. KC Roof Plumbing was using Salesforce as a CRM to help manage business leads. What if it could do more?

Our job as a Salesforce partner specialised in construction is to help our customers see beyond Salesforce as a traditional CRM. Rather, Salesforce has so much more to offer as an end-to-end platform. For a construction business, this means Salesforce can support the entire spectrum from acquiring and converting leads, through to quoting,

Why Carnac?

“The team at Carnac Group gave me the confidence to bring all my ideas to life. All the way through, they knew the product and worked with me every step of the way. Nothing was impossible.”

Casey Henwood, CEO, KC Roof Plumbing

as well as project delivery and completion. After all, this is where the true potential for digitising a traditional construction business comes to life.

Together, we created a wish list for how Casey could run his business from Salesforce. It included:

- Detailed product quoting via Salesforce CPQ
- Automated project handover from sales to delivery
- Simple document generation for quotes and variations
- Managing project finances - including integration with Xero for invoicing, bills, payments and timesheets
- Site inspections and defect logging with image capture using Sharinpix
- Staff scheduling via simple calendar function
- Pushing personalised staff notifications
- Workplace Health and Safety (WHS) processes and audit compliance
- Efficient project document generation, including Safe Work Method Statements (SWMS)
- Mobile capability for all end users
- And much more.

Once Casey understood what was possible with Salesforce, we set about bringing his vision to life.

Our Results

These days, KC Roof Plumbing manage their whole operations on their Salesforce platform. Business processes are now much more streamlined with an end-to-end view of leads, from quoting



through to project completion and delivery. Furthermore, using automation in Salesforce, KC Roof Plumbing has replaced previously manual processes of monitoring leads and tracking on spreadsheets. After winning an opportunity, project handover from sales to delivery is now also triggered with automations.

Job finance management has also significantly improved. Thanks to a simple integration between Salesforce and Xero using TwixRiva, KC Roof Plumbing's accounting is now at the heart of their CRM. As a result, customer, supplier and sub-contractor invoices are now all accessible and actionable from within the Salesforce platform. Likewise, employee timesheets traditionally handled separately by Xero, are now also within Salesforce.

On a project, Salesforce shows KC Roof Plumbing cost of labour hours versus actuals, as well as a more granular view of how different parts of a project are performing. This means decisions can be made confidently based on data to help keep a project and profitability on track. For KC Roof Plumbing, managing project costs, operations and customer relationships has never been easier.

For employees, Salesforce's mobile capability makes light work. These days, the KC team get clarity around their project allocations via push notifications, maintain their timesheets, create site inspections, and more all from their mobile devices.

For Casey, this makes the world of difference.

“Before, all our data and processes were disjointed. Now we have the simplicity of entering something once and having the answer everywhere: pipelines, resource management, money coming in. We could do all that before, but not in real time and definitely not as comprehensively.”

“It's reduced the administration burden for myself, our project managers and office manager and allows us to do our day-to-day work in a better way.”

“My vision was to have the systems and efficiency of a large company, while maintaining the spirit of a small business for our people and customers. I've got that now with Salesforce.”

Casey Henwood, CEO,
KC Roof Plumbing



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About Carnac Group

Carnac Group is a certified Salesforce partner in Australia. We advise businesses on any aspect of their Salesforce journey including strategy development, Salesforce implementations and improvement projects. More than just tech experts, our clients value our business acumen and change management expertise to help them truly transform their business with Salesforce technology.