

Objective

A design-build remodeling contractor desired to drive continued growth in his business.

Challenge

As the sole employee, this business owner spent the vast majority of his time on jobsites managing subcontractors, meeting with inspectors and homeowners, and engaging with prospective customers, leaving him little time to manage the details of his business.

Estimating, creating proposals, and contracting required the entry of the same details in multiple places making it **inefficient** and subject to **errors**.

A **lack of organization** and means of **controlling access** to files by homeowners and trade partners, meant that the business owner was continually being asked to send plans, specs, and other documents, resulting in a backlog of texts, voicemail messages and emails and potentially **delaying progress** on the jobs.

Finally, this business owner struggled to stay on top of administrative, customer service, and project management tasks and would **"catch up"** on emails and paperwork **during the evening and on weekends**.

The business owner was unable to take advantage of exceptionally favorable market conditions for home remodeling and residential construction with his current processes and was disappointed to turn down business.

Solution

By leading the business owner through a deep-dive session, I discovered and documented the gaps between the current state of the business operations and the ideal state. After **prioritizing the gaps**, I developed a strategic plan that included **short-** and **long-term improvements**.

Once the easy, high-impact changes were implemented, I lead the requirements gathering and sales presentation process to review and select a suitable project management platform. I was further retained to manage the **implementation** and coordinate user training.

Results

Implementation of a construction management platform, optimization of existing email organization, and integration of accounting software allowed the business owner to **improve** his internal **operations**, **customer experience**, and trade partner relationships.

As a result of these improvements, this business owner has stated that he is **200% more efficient** in managing his projects and now sees the opportunity to take on more business.

