

# Survey Roofing **boosts performance** with Causeway's integrated solution

In implementing **Causeway's Vixen and Telematics** solutions, Survey Roofing has been able to significantly increase turnover and improve cash flow.

## SURVEY ROOFING

In implementing **Causeway's Vixen and Telematics** solutions, **Survey Roofing** has been able to significantly increase turnover and improve cash flow. Major time-savings have been achieved in key areas, including completion and invoicing of jobs, production of Work in Progress (WIP) reports and timesheet completion.

Crucially, the Causeway solution provides powerful Dashboards and Analytics tools for strategic management, working in tandem with Vision reporting to ensure managers are working with meaningful, up-to-date information.

Having been using a service & maintenance package with limited functionality, Survey Roofing decided to research the market for a more powerful solution. Having considered various options, Causeway Vixen Service & Maintenance management – including Mobile Workforce – and Telematics vehicle tracking were introduced in April 2015.

*"The system we were using before was inefficient and resulted in a lot of duplicated effort,"* recalled Finance Director Terry Noone.

**"By working with Causeway we have improved efficiency considerably and we are completing more jobs than ever before – enabling us to take on more work with the same resources whilst also adding value for customers."**

*"This enhanced availability of information is particularly valuable to companies with extensive property portfolios, where we have seen a significant increase in business since introducing Vixen,"* he continued.

*"An example of this is how our senior staff, including operations managers and schedulers, are using the Dashboard and Analytics tools. These enable completed jobs and invoice status to be highlighted in real time and made available to key decision makers. We are also able to highlight real-time turnover and the status of top clients at that point in time."*

*"The result of this is that the Board has timely visibility of key data without having to request information and then wait for an offline report to be produced. Anyone with the appropriate permissions can access this information,"* he added.

## ENHANCED REPORTING

Vision reporting is also proving to be a useful tool, enabling information from different sources to be consolidated so that reports are produced at the touch of a button.

*"Integration was a big part of why we chose Vixen,"* Terry Noone noted. *"Previously there was considerable duplication with multiple systems that couldn't talk to each other, resulting in widespread inefficiencies. With Vixen and Vision we can produce Planned Preventative Maintenance (PPM) reports for clients very quickly and all this information then goes into the estimating system and letter templates come out automatically."*

MAPPING AND SCHEDULING  
INTEGRATION WITH  
REAL-TIME LOCATION AND  
JOB INFORMATION

JOB LEVEL COSTING WITH  
TRANSACTIONAL DRILL DOWN;  
MEASURE ESTIMATED COSTS VS.  
ACTUAL COSTS VS. SALES REVENUE



## PROCESS EFFICIENCIES

Much of the increased efficiency comes from reducing time spent on routine tasks. For example, whereas it used to take a week to process timesheets, this is now done in one day. Moreover, timesheets are now exchanged electronically, eliminating the time and cost associated with postage, as well as providing a more reliable mechanism.

Similarly, WIP reports are generated in minutes in Vision, rather than being produced manually, saving around three days per month. Furthermore, in the past there was a long delay in producing WIP reports as information had to be transferred manually from timesheets to spreadsheets.

The time spent on document scanning has also been reduced as a result of using Vixen, freeing up one person's time to focus on higher value tasks. These improvements have also led to higher staff morale, as people are now spending more time on interesting and stimulating tasks.

**"Just as importantly as the time-savings, we now have comprehensive Key Performance Indicators to monitor the efficiency of our teams, something that was not previously available," Terry Noone observed.**

*"Using Vixen and Telematics, we know where all operatives are when they are working and are able to target completion times. Similarly, the activities of all estimators can be monitored in real time.*

*"Overall, this KPI data provides the management team with invaluable information to track trends, understand the company's current performance and focus on actions that will deliver improvements in performance. For example, we are now achieving a 90% rate for first-time fixes – and have the data to prove it to existing and prospective customers. Also, we are now able to measure and monitor the performance of sub-contractors to ensure they maintain the levels of service our customers expect," he continued.*

## TELEMATICS

Telematics provides constant tracking of Survey Roofing's workers to help **ensure that resources are being used efficiently** through enhanced scheduling and routing. The scheduling functionality is particularly valuable during the winter months as roofing work cannot be carried out in poor light conditions.

The company is also using the dashboard and heat maps in order to see where there were heavy densities of work in the previous year due to weather conditions. This information underpins vplanning for the current year and by ensuring the right number of workers are available at the right times.

## SUMMARY

In taking advantage of the powerful functionality of the Causeway solutions, as well as the integration between them, Survey Roofing has been able to address many of the challenges facing companies in the roofing sector.

Through increased efficiency and clearer visibility of performance data, the company has achieved significant time and cost savings while, at the same time, enhancing the service it provides to customers. These benefits have already resulted in winning more business whilst improving the productivity of the workforce.

### Overview of savings



#### **Producing invoices for large clients**

2 days per month saved, per client



#### **WIP reports**

3 days per month saved



#### **Timesheet processing**

4 days per month saved



#### **Report completion**

2 weeks per month saved



#### **Timesheet completion**

1.5 hours per day saved per operative



#### **Fuel consumption**

1 gallon per day saved per vehicle

### Overview of benefits

**Increased turnover**

**Higher win rates**

**Improved cash flow**

**Enhanced productivity**

**Better visibility of performance data**

**Comprehensive KPIs for measuring performance**

**More efficient resource management**

**Tighter monitoring of workforce**

**Faster, more timely and more detailed internal and external reporting**

**Measurement of sub-contractor performance**

## SURVEY ROOFING

*Survey Roofing is a nationwide roofing specialist delivering high quality commercial roofing installations as well as inspections and surveys. Through its 24 hour help desk, the company also provides planned & reactive maintenance solutions delivered by qualified roofers using a fleet of Mobile Elevated Work Platforms (MEWPs).*