



## Transparency on bids, risk & cashflow

How ECLEVA, a Microsoft Partner, used cloud technologies to simplify a construction company's IT, and improve bid-management and reporting

### Overview

When family-owned business Richard Crookes Constructions (RCC) wanted to improve bid management and gain better insights into finance and site activities, Microsoft Certified ECLEVA was engaged. As a construction-industry specialist, ECLEVA understands what construction companies are trying to achieve. After simplifying an existing Microsoft Dynamics installation, ECLEVA created an easy-to-use bid-management system using cloud technologies. To help with cashflow control, ECLEVA also created a construction-site diary application, which logs day-to-day deliveries. With greater insight, dashboard reporting and enhanced control, RCC has managed its own impressive growth, doubling in size from 2014–2018.

### The Need

Richard Crookes Constructions (RCC) is typical of many mid-sized construction companies. Founded in 1976, this family-owned company is one of Australia's best-known design-management firms. It has multiple iconic projects to its name, including East Circular Quay and the UTS building in Sydney. Today, RCC designs and delivers projects right across New South Wales and the Australia Capital Territory.

## CASE STUDY

RCC wanted new IT tools to help manage rapid business growth — and specifically to help manage bids, cashflow and construction-site reporting. But the company faced a dilemma. It already had a Microsoft Dynamics deployment, but it didn't want to keep extending Dynamics and risk it becoming too costly or complex to maintain. To manage its own growth, RCC wanted a tactical approach to IT, with projects that solved specific challenges and delivered a rapid return on investment.

RCC's first, immediate challenge was bid management. Rapid growth meant more tendering for contracts, so that at any one point in time, the company was bidding for multiple projects. Each tender was at a different stage with a varying chance of success. But executives needed a clear view of likely incoming projects, so they could plan resources and manage growth.

The second big challenge was cashflow forecasting. The company had developed a series of Excel spreadsheets to manage budget forecasts against site deliveries. Since the spreadsheets were used by multiple people, however, it was difficult to keep the spreadsheets up to date and accessible at the same time. What RCC wanted was an integrated, site data-capture system.

### The Solution

Acting on a referral, RCC asked Microsoft Partner, ECLEVA, to investigate. ECLEVA specialises in creating bespoke business software solutions for companies in the construction industry. After analysing RCC's existing Microsoft Dynamics platform, ECLEVA concluded that although expertly deployed, it was over-engineered for RCC's actual needs. If it were simplified, it would be easier to adapt to meet specific business challenges.

ECLEVA's CEO and construction-industry specialist, Patrick Northcott explains ECLEVA's role: "Our job was to create new capabilities while bringing Dynamics back to its simplified, un-customised state that workers would find easy to use," he says. "Our goal was to reduce the total cost of ownership for the future. We achieved this by using technology out of the box without additional coding."

The ECLEVA team has completed three major projects for RCC. These projects have gradually transformed the way that RCC tracks bids, plans cashflow and creates reports.

#### 1. Tender pipeline reporting and document capture

At any point in time, RCC was bidding for scores of new contracts. Directors wanted a clear assessment of progress on these bids, so they could allocate resources and manage their pipeline of work.

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## CASE STUDY

ECLEVA used cloud technologies – including Microsoft Dynamics 365 – to build a tool that captures the current state of RCC bids in a series of highly visual dashboards. It enables everyone to track the progress of bids and gain real-time insights into the sales pipeline.

### 2. Cashflow forecasting and a site-diary system

Like all construction companies, RCC needed to align its cashflow forecasts with onsite deliveries. But deliveries were subject to numerous variables, such as weather and the rate of concrete pouring. ECLEVA built a site diary-management system to help align forecasts with expenditure. This involves the site supervisor entering site data into a Dynamics diary app, from which data is uploaded into the project budget. This helps RCC to manage cashflow with greater precision.

### 3. Business intelligence for Executive Management

With the business growing fast, RCC directors and project managers needed to maintain clear oversight on all projects, so they could manage risk and ensure profitability. ECLEVA used Microsoft PowerBI to build a comprehensive user-friendly set of Executive Management Reports. This capability makes it far easier to produce monthly reports on operational health and safety, cashflow and site activities. It gives managers the ability to investigate multiple systems, identify trends and track key metrics.

## Result

By making complex systems simple, ECLEVA has helped RCC achieve its long-term business goals. With more accurate bid management the company has superb control over its project pipeline. This has made it easier to manage a company that has doubled in size over the past four years and increased its headcount to 800 employees.

By simplifying IT and creating a solid platform for individual solutions, ECLEVA has made it easier for RCC to adopt new business software solutions.

"Our clients tend to stay with us because we are always there, and we always provide cost-effective solutions," says Patrick. "We are constantly bringing new technologies into our client businesses and adapting them to create specific solutions that reduce complexity and long-term costs."

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Learn more about how ECLEVA helps construction companies save costs and operate more efficiently. Contact us at [info@ecleva.com](mailto:info@ecleva.com) or call us on 02 9467 9300.