



SOCKEYE

Sage Partner

SAGE INTACCT

CASE STUDY

How A Top Residential Roofing and Solar Company Made A Strategic Pivot to Operational Excellence



THE SITUATION

SmartRoof, a leading residential roofing and solar company, faced substantial hurdles during a period of rapid expansion. Specializing in both traditional roofing and cutting-edge solar installations, their operational complexity surged alongside their growth. The reliance on QuickBooks Online became increasingly problematic as the software failed to scale with their evolving needs. SmartRoof’s leadership recognized the need for a more robust, flexible accounting system that could handle their expanding operations and facilitate strategic decision-making, prompting their transition to Sage Intacct, facilitated by the expertise of Sockeye.

THE CHALLENGE

As SmartRoof grew, it encountered significant limitations with QuickBooks Online, its existing financial software. The software, crucial to their early financial management strategy, struggled to handle the increased complexity and volume of transactions and projects associated with the company’s growth. This inability to scale effectively became a significant barrier, impeding operational efficiency and limiting strategic decision-making capabilities, prompting SmartRoof to seek a more capable financial management solution.

“The pain point of Quickbooks Online was us outgrowing it and becoming limited in the number of different dimensions that were available to us.” - Lindsey Reynolds, Controller at SmartRoof

The need for more detailed financial analysis and reporting highlighted another set of challenges with QuickBooks Online. Its limited reporting

COMPANY OVERVIEW

SmartRoof is a pioneering residential roofing and solar company headquartered in Reston, VA, with offices across the US. Specializing in seamless project guidance and insurance assistance, their mission is to make a positive impact on lives through innovative roofing and solar solutions, driving environmental benefits and customer savings.

EXECUTIVE SUMMARY

Previous Software:
Quickbooks Online

Results with Sockeye:

Transformed Financial Reporting

Operational Efficiencies and Productivity Gains

Strengthened Financial Controls

features fell short of providing the comprehensive insights required by SmartRoof's management, hindering strategic planning efforts. **"Management wanted to be able to drill in and get granular with reporting, and with Quickbooks Online, we weren't able to do that."** Lindsey mentioned. Moreover, the software's lack of customization options restricted SmartRoof's ability to tailor the system to their specific needs, especially for nuanced financial reporting. These shortcomings underscored the necessity for a transition to an advanced accounting system that could not only fulfill their immediate needs but also support SmartRoof's ambitions for continued growth and strategic development.

SmartRoof needed to solve for:

- Scalability Limitations
- Insufficient Reporting Capabilities
- Customization Constraints
- Demand for Detailed Reporting

THE SOLUTION

Upgrading to Sage Intacct Construction

SmartRoof's journey towards operational and financial optimization led them to Sage Intacct. The solution stood out as a well-equipped option to meet SmartRoof's growing demands, with a blend of scalability, advanced reporting, and flexibility that was notably absent in their previous software. Lindsey noted, **"Sage Intacct allows us to leverage custom fields and dimensions to get to the data the way we need."**

Scalability

Sage Intacct's capacity to adapt to SmartRoof's expanding operations was a key factor in their decision. The software's scalability ensured that growing transaction volumes and increasing business complexity could be managed effectively, supporting SmartRoof's upward trajectory without the need for frequent system changes.

Advanced Reporting

The detailed and customizable reporting features of Sage Intacct addressed SmartRoof's need for in-depth financial insights. This capability was critical for extracting actionable intelligence from their financial data, enabling SmartRoof to make informed strategic decisions.

Customization and Flexibility

Unlike the rigid structure of their previous system, Sage Intacct offered a high degree of customization. This flexibility allowed SmartRoof to tailor the software to their specific operational and reporting needs, thereby enhancing efficiency and productivity across the board.



Sage Intacct allows us to leverage custom fields and dimensions to get to the data the way we need.



Lindsey Reynolds
Controller, SmartRoof



Efficient Project Management and Reporting

Recognizing the challenge of managing thousands of projects, Sage Intacct provided specialized tools for project accounting. This feature streamlined project-level financial tracking and reporting, a crucial requirement for SmartRoof's business model.

THE OUTCOME

Following the implementation of Sage Intacct, SmartRoof witnessed a transformation in their financial management processes, with significant improvements in efficiency, reporting, and strategic planning.

Transformed Financial Reporting

The shift to Sage Intacct brought about a dramatic improvement in SmartRoof's financial reporting capabilities. With the help of Sockeye, the creation of custom reports, like the WIP report, exemplified Sage Intacct's impact, enabling significantly quicker and more insightful financial analysis with less manual effort.

Operational Efficiencies and Productivity Gains

The automation and streamlining of financial processes resulted in notable time savings across various accounting tasks. These efficiencies allowed SmartRoof to redirect focus towards strategic business activities, enhancing overall productivity and operational performance.

Strengthened Financial Controls

With Sage Intacct, SmartRoof enhanced their financial governance through improved internal controls and compliance mechanisms. The introduction of automated approvals and checks significantly reduced the risk of errors, ensuring the integrity of their financial data.

The overall adoption of Sage Intacct marked a pivotal moment for SmartRoof, driving significant improvements in financial management, operational efficiency, and strategic decision-making. These outcomes have not only resolved the challenges faced with their previous system but also positioned SmartRoof for continued success and growth in the competitive roofing and solar industry.

INTEGRATIONS

For SmartRoof, a critical element of their operational efficiency and success was the seamless integration of Sage Intacct with their existing systems. Lindsey Reynolds highlighted the essential role these integrations played, particularly noting the importance of API, expense, accounts receivable (AR) integrations, and the synergy with their Customer Relationship Management (CRM) system. These integrations were pivotal in ensuring that SmartRoof's diverse operational platforms communicated effectively, creating a cohesive and streamlined workflow.



We get the sense that everybody loves what they do at Sockeye and it shows.



Lindsey Reynolds
Controller, SmartRoof



The expertise and support provided by Sockeye in this integration process were invaluable. Reynolds praised the support team for their deep understanding of the various applications and their integration mechanisms, which was crucial for SmartRoof. She noted, **“We needed someone who understood the ins and outs of all the different applications, how they integrate, and how it works. Sockeye was able to do that for us.”** This expertise allowed for the smooth functioning of Sage Intacct within SmartRoof’s complex ecosystem, underscoring the software’s flexibility and the service provider’s adeptness. The successful integration of Sage Intacct with other critical systems underscored the adaptability of the software to meet specific business needs, enhancing operational efficiency and supporting SmartRoof’s growth trajectory.

WORKING WITH SOCKEYE

A Collaborative and Supportive Experience

SmartRoof’s collaboration with Sockeye was characterized by exceptional responsiveness, tailored solutions, and an approach that went beyond the typical client-service provider relationship. The team at Sockeye distinguished themselves through their organized and rapid response, described by Lindsey Reynolds as **“Fast, easy, and simple.”** This responsiveness, coupled with custom solutions like the creation of a custom Work In Progress (WIP) report, demonstrated Sockeye’s commitment to addressing SmartRoof’s unique operational challenges.

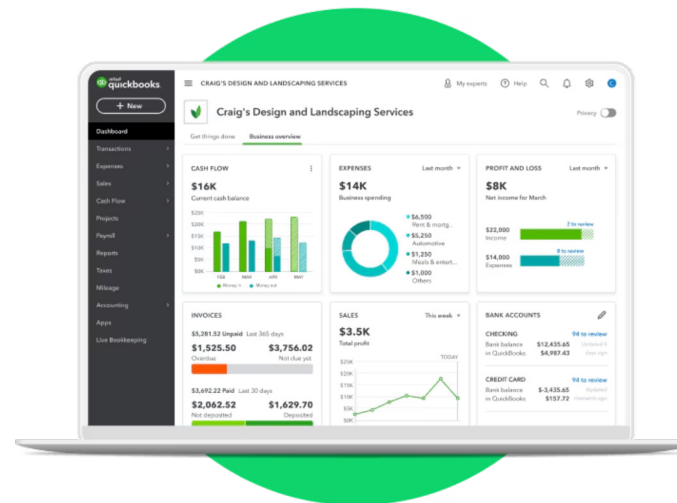
“Sockeye has done custom reports and the interactive custom writer report for us thus far. One report in particular that was the most helpful was the monthly WIP report that Sockeye created. Previously it was time consuming with manual calculations and data pools and combining data, now it is instantaneous.” - Lindsey Reynolds, Controller at SmartRoof.

The effectiveness of this partnership was further enhanced by regular, clear communication and a shared commitment to transparency and trust. However, it was the personal qualities of the Sockeye team—friendliness, helpfulness, and professionalism—that Lindsey Reynolds highlighted as the most significant aspect of their collaboration. **“The best part about working with Sockeye is the people. Specifically their friendliness, their knowledge, their willingness to help and even come up with different ideas that we haven’t thought of.”** she remarked, emphasizing the importance of positive human interactions in business. This synergy between professional expertise and personal engagement defined the success of SmartRoof’s experience with Sockeye, setting a benchmark for service excellence built on efficiency and empathy.

“We get the sense that everybody loves what they do at Sockeye and it shows.” - Lindsey Reynolds, Controller at SmartRoof

ADVICE TO ANYONE LOOKING TO SWITCH ACCOUNTING SOFTWARE

In offering advice to other businesses considering a switch in their accounting software, Lindsey Reynolds emphasizes the importance of conducting thorough research and choosing a system that aligns perfectly with the business’s unique needs. She advocates for asking detailed questions to ensure the new software can fully support the business’s requirements, emphasizing not to settle.



ABOUT SOCKEYE

Sockeye is a leading consulting services firm that leverages Sage Intacct to help construction businesses achieve full cohesion and transparency between operations, finance, and accounting.

Contact us today for a demo and see how Sockeye can simplify your accounting ecosystem.

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