smartsheet

American Roofing speeds up purchasing and cuts costs with Smartsheet document builder

American Roofing has grown from a small, local construction business to a major regional contractor. Smartsheet helps the company automate and speed up its business processes to manage and complete jobs faster and more professionally.

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Smartsheet document builder cut days of information exchange from our purchase order process. We average 25 POs per day with 260 suppliers. Within the first month of using document builder as part of a new highly automated purchasing process, we have been able to free up at least two full-time employees who are now doing other things that are a lot more productive than chasing around a purchase order.

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Rob Waite, Executive Vice-President,
American Roofing & Metal

AMERICAN ROOFING & METAL

Customer:
American Roofing & Metal

Industry:
Architecture, Construction and Engineering

Organization Size:
Medium (50 - 999 employees)

Region:
North America

Website:
americanroofingonline.com

Customer Profile
American Roofing & Metal, Inc. is a family-owned roofing business based in Louisville, Kentucky. Over more than 100 years, American Roofing has earned a steady reputation for providing quality-roofing solutions for residential, commercial and industrial customers.

Background
Over more than 100 years, American Roofing & Metal has grown from a small local business to a sizable regional roofing construction firm. It's now too large to rely on paper-based information storage and manual processes for purchasing, planning, and other business processes. With the help of new Smartsheet functionality, including document builder and form builder with conditional logic, American Roofing has professionalized and sped up its purchasing, hiring, and other administrative work, saving time and money while boosting its professional image.

"The company had grown almost fivefold over the course of about three years," says Rob Waite, executive vice president of American Roofing. *"We were really struggling with how to scale their IT infrastructure. You couldn't continue to add people to resolve the issue; it was more of a deep issue of process, which required automation and collaboration technology to fill the gap."*

Solution
American Roofing serves residential, commercial, and industrial customers in Louisville, Lexington, Cincinnati, and a broad surrounding region. Waite describes roofing as a "high-velocity" part of the construction process, the last stage of a building project that is often pushed to meet a tight deadline. Contracts can be awarded on a Thursday for work to begin on Monday. That leaves little time to source building materials, assign and schedule workers, and ensure that all required certifications are in place. On top of all that, American Roofing's manual business processes made it difficult to move as quickly as customers needed.

"In the past, there was a lot of dependence on two things: tribal knowledge, as we call it, and spreadsheets everywhere," Waite says. *"There really wasn't a single place to look at the information, and creating it was administratively heavy. We needed to have information stored in a centralized location that was very easy to retrieve on any device, anywhere, at any time. And it had to be as automated as possible."*

Waite had implemented Smartsheet at American Roofing about three years earlier to help ease a

Customer:
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leadership transition and connect disparate parts of the business. He realized that the company's major challenges of document generation and duplicate data entry could be solved with two new platform features: document builder, and conditional logic in forms.

Document builder transforms purchasing

Most of American Roofing's customers and vendors require printed purchase order (PO) documents to satisfy audit and oversight requirements. Generating them was a laborious process of copying data from the Smartsheet project record into an editable PDF template. Waite was looking for solutions to automate the data transfer process when Smartsheet announced the beta of document builder.

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Under the old process, POs were faxed to vendors, triggering phone calls to confirm the order and pin down a delivery date. That sometimes took several days. With document builder, once a purchase is approved, an admin clicks one button to automatically email the vendor a PO with a link to confirm receipt, and a calendar picker for the delivery date. That response automatically returns to the American Roofing system, giving the project team the information they need to start scheduling workers for the job.

"The whole process is completed within an hour — at most — for around three-quarters of the purchase orders we place," Waite says. *"From the time it's been approved, to when it goes to the supplier, to when the supplier has given us a delivery date and the project superintendent knows when that material's going to arrive. And it only took one person to make all that happen by just clicking 'generate document.' That's a huge time savings, which frees people to spend more time on value-added work instead of administrative paperwork."*

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In a Nutshell:

Roofing teams need to update project details at the worksite, so Waite built forms within Smartsheet to make it easier for teams to capture information on mobile devices. His original forms were long, loaded with every conceivable project detail. Then Smartsheet introduced conditional logic for forms, and Waite could streamline the data entry process to speed up work and prevent errors.

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Quickly creating offer letters for new hires

American Roofing also uses document builder to generate offer letters for new hires. When the hiring manager is ready to extend an offer, one click creates a customized letter with pay and other details, ready for the manager and candidate to sign at the end of the final job interview. This enables everyone to immediately start pre-employment processes like drug screenings, background checks, and OSHA training.

"The candidates are kind of blown away by that," Waite says. *"They may have interviewed at other places and didn't get that kind of turnaround. And it helps compress the time frame between making a hire and when they're able to start. Anytime we can take days off that, it helps tremendously, and it always starts with the initial offer letter."*

Waite and his colleagues plan to use document builder for other document-reliant processes such as commercial bids, project submittals, and change orders. By automating key points of the pitch and construction process, American Roofing can more quickly respond to opportunities and document changes that can affect costs, preventing surprises when the final invoice is sent. And Waite says his platform is auditor-approved; the integrated document approval process protects data, and his HR expert says there's no need to invest in an expensive human resources information system (HRIS) to accomplish what Smartsheet delivers.

Foolproofing information entry and eliminating duplication with forms

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"A traditional spreadsheet runs horizontally," Waite says. *"But when you have a few hundred people working off smartphones, horizontal versus vertical makes a gigantic difference in the speed with which they can go through it. I was starting to look for alternatives to our big, complex forms when Smartsheet introduced conditional logic. The form shows you just the minimum, but when you enter*

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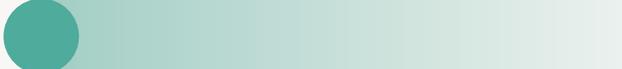
*data that meets certain conditions, additional
cells present themselves. This helps with accuracy,
because people can't accidentally go down the
wrong path."*

Improved visibility and professionalism through dashboards and reports

Just as forms simplify the input of crucial data,
Smartsheet dashboards enable Waite to tailor
reporting to the stakeholders who need it. He can
give senior management a clear view of project
status, flagging any potential problems early so
they can be addressed before they throw off work
schedules or lead to cost overruns.

He's also created customized task dashboards for
administrative staff that create a logical workflow
for the day, prioritizing tasks to make it easier to
focus on what's most important. As admins check
off the most important projects, they gain a clearer
view of what their efforts mean to the company
as a whole. This process even generates healthy
competition among the staff to see who can
effectively accomplish the most in a day.

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*"Because roofing is taking place at the last
minute, it's hard to find the time to come off as
professionally as you can,"* Waite says. *"Smartsheet
has helped us not just with the speed with which
we can respond to customers' needs, particularly
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