

Cable's Roofing

Building the operating foundation for growth

Joel Ward | Company case study

The business need

Cable's Roofing needed operating processes that could support growth without routing every routine decision through the owner. Sales, production, customer communication, hiring, and subcontractor administration needed clear responsibilities and consistent handoffs. My work connected those activities through documented processes and CRM workflows, helping the owner work on the business while the team handled more of its day-to-day execution.

From sales process to operating system

The April 2020 Salesforce development memo mapped the documents and decisions needed to move a lead through inspection, estimating, contracting, production, quality control, and completion. It treated the CRM as part of the operating process: the system needed to support the information people required at each stage, not simply hold customer records.

Salesforce worked in beta. The owner later changed direction over recurring platform costs, and JobNimbus became the primary production CRM. The requirements, workflow knowledge, and vendor API learning from the first build helped the second build move faster. Supplier integration began with ABC Supply and then extended to Southern Shingles, supporting the company's use of two suppliers.

The December 2021 JobNimbus workflows distinguished cash jobs from insurance jobs. They defined steps for customer messaging, inspections, estimates, contracts and collections, production readiness, material ordering, scheduling, quality control, invoicing, and closeout. Insurance work added claim, adjuster, approval, and supplement steps.

Sales performance and owner management

Turning operating information into management tools

Making sales effort measurable

The sales tools made the work of managing a growing team more concrete. Representative KPI worksheets tracked doors knocked, inspections, qualified prospects, claims, signed contracts, and approvals. The activity planning calculator linked annual sales goals to conversion assumptions, average sale, and working time. The dashboard brought budget and actual sales, sales mix, representative performance, and closing ratios into a management view.

Connecting estimates to job economics

The roof estimating calculator connected project takeoff quantities with material and labor orders, costs, commissions, and margins. Supporting catalogs supplied product choices and rates. The job-cost workbook compared actual job economics and hypothetical pricing examples, making material and labor costs, extras, profit, and price per square visible together.

Giving owners a forward view of cash

The owner cash-management model connected beginning cash, expected receipts, payables, payroll, recurring expenses, credit-line use, and owner-related cash requirements. It included receivable and payable forecasts, accounting-update schedules, forecast confidence, and average daily gain or loss. These tools gave management a structure for looking ahead at cash requirements while monitoring sales and job economics.

Giving the team clear ownership

The communication SOP established contact deadlines, escalation paths, and the transfer of the customer's primary contact from sales to production after contract signing. The recruiting SOP documented approval and HR coordination. The commercial subcontractor packet connected agreements and supporting forms to onboarding, approved contractor records, and accounting setup.

Together, these work products show the practical work of turning individual knowledge into repeatable company processes. The objective was to prepare Cable's to handle growth with clearer accountability and less owner dependence. That foundation can also support a future sale by making operations easier to understand and transfer.

Work sample index

Browse the Cable's case by type of work. Links open the accompanying PDFs after the package is extracted. Spreadsheet columns fit together on landscape pages; long sheets continue vertically. Larger landscape pages keep wide sheets legible. Supporting schedule excerpts remain labeled.

Work sample	Type of work	View
Salesforce development memo	Plans and strategy · CRM and systems	Open PDF
JobNimbus workflows	CRM and systems · SOPs and process	Open PDF
Communication and escalation SOP	SOPs and process · CRM and systems	Open PDF
Employee recruiting request SOP	SOPs and process	Open PDF
Commercial subcontractor packet	Agreements and structures · SOPs and process	Open PDF
Sales and owner dashboard	Performance management · Financial management	Open PDF
Sales representative KPIs	Performance management · Sales management	Open PDF
Sales activity planning calculator	Sales planning · Financial models	Open PDF
Roof estimating and ordering calculator	Estimating and pricing · Financial models	Open PDF
Job cost and pricing analysis	Estimating and pricing · Financial management	Open PDF
Owner cash flow and cash management	Cash flow planning · Financial management	Open PDF

Original work samples

Original documents and workbook views show the work behind the case. Personal identifiers are redacted. Workbook exhibits retain historical values and display all selected columns together; conversion and excerpt choices are explained on their opening pages.

Salesforce development memo

Plans and strategy · CRM and systems

Dated April 30, 2020, this memo translates the sales and production process into document and system requirements. It connects lead handling, inspections, estimates, contracts, production instructions, quality control, and completion. It shows how operational requirements were translated into a CRM development brief.

[Open PDF](#)

JobNimbus workflows

CRM and systems · SOPs and process

Dated December 6, 2021, these original cash-job and insurance-job workflows map the sequence from a new lead through production and closeout. They include customer messages, production packet checks, collections, material ordering, scheduling, quality control, and referrals. The separate insurance path adds the claim and supplement steps needed for that work.

[Open PDF](#)

Communication and escalation SOP

SOPs and process · CRM and systems

Implemented August 3, 2021, this SOP sets response deadlines, escalation responsibilities, tagging expectations, and the customer-contact handoff from sales to production. The original document is titled “Schedule Controls Process”; its filename refers to tagging and communication touchpoints. Both the original content and title are preserved.

[Open PDF](#)

Employee recruiting request SOP

SOPs and process

Implemented August 3, 2021, this procedure defines how a manager requests a hire, obtains department and general-manager approval, and coordinates with HR. It covers candidate sources, required skills and experience, the signed request, and ongoing communication. It makes the approval and recruiting responsibilities explicit.

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Original work samples continued

Commercial subcontractor packet

Agreements and structures · SOPs and process

This 21-page packet combines the commercial subcontractor master contract, job order, lien-waiver forms, warranty letter, release, and supporting government forms. Its onboarding checklist connects HR, production, and accounting records. The master contract carries a February 2022 revision date. Standard agency forms are supporting components of the assembled packet.

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Sales and owner dashboard

Performance management · Financial management

The sales dashboard compares budget and actual sales, sales mix, representative performance, and closing ratios. The financial dashboard connects projected and actual cash, forecast confidence, and receivable and payable aging. Supporting sheets show the data behind the views. The source funnel chart uses a labeled bar-chart compatibility view in the PDF.

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Sales representative KPIs

Performance management · Sales management

A team totals sheet and eleven representative sheets track daily and weekly sales activities from doors knocked through contracts approved. Conversion measures connect activity to progress through the sales process. Each populated worksheet is shown, with names redacted and the original saved displays retained.

[Open PDF](#)

Sales activity planning calculator

Sales planning · Financial models

This compact worksheet links sales goals to activity and conversion assumptions, average sale, working days, and time off. It makes the relationship between annual targets and day-to-day sales effort visible. The PDF presents the complete populated worksheet in its original layout.

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Original work samples continued

Roof estimating and ordering calculator

Estimating and pricing · Financial models

The roof takeoff form connects project quantities to material and labor orders, pricing, commissions, and margins. Product, color, labor-rate, and reference sheets support the form. The PDF includes every populated worksheet, with clearly labeled excerpts for three supporting catalogs. Customer and employee identifiers are redacted.

[Open PDF](#)

Job cost and pricing analysis

Estimating and pricing · Financial management

Actual jobs compare price per square, material and labor costs, extras, and profit margins. A separate hypothetical sheet explores material choices and pricing at different margins. Together, the sheets make job economics visible alongside the estimating process. Both populated sheets are included; identifying details are redacted.

[Open PDF](#)

Owner cash flow and cash management

Cash flow planning · Financial management

The owner model connects beginning cash, receipts, payables, payroll, recurring expenses, credit-line use, and owner-related cash requirements. Supporting sheets cover forecast confidence, average daily gain or loss, receivable and payable forecasts, and accounting updates. The PDF uses the workbook's saved figures and labels schedule excerpts explicitly.

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