

MEASURE · IMPROVE · REALIZE

Hawkins & Hayes

PROCESS OPTIMIZATION

CASE STUDY

CLIENT BACKGROUND

The client had grown steadily over three decades, evolving from a family-run trade business into a regional contractor serving both construction and maintenance clients. However, its operating model had not kept pace with scale. Project delivery was fragmented, field reporting inconsistent, and scheduling reactive. The owners, fatigued by cash-flow swings and constant firefighting, recognized that process discipline — not more sales — was the key to restoring stability and margin confidence.

OUTCOMES AND DELIVERABLES

The optimization program generated measurable, sustained improvements across operations and finance:

- **14% labor productivity gain** within three months of implementation.
- **+2.6 percentage points in gross margin**, driven by reduced idle time and rework.
- **Service response time** improved from 48 hours to 26 hours.
- **Billing delay reduction of 60%**, accelerating cash flow and freeing working capital.

EXECUTIVE SUMMARY

A $45 million HVAC contractor with a 30-year legacy faced volatile project margins, inconsistent service response times, and mounting operational inefficiency. Despite strong sales, profit predictability and scalability were eroding. Over a 10-week engagement, Hawkins & Hayes redesigned the client's workflows, digital tools, and accountability structure — creating a leaner operating rhythm that improved labor productivity by 14% and increased gross margin by 2.6 percentage points within three months.

THE CHALLENGE

After completing the *Measure* tranche, Hawkins & Hayes identified process inefficiency as the largest controllable source of margin drag — particularly within project delivery and service scheduling.

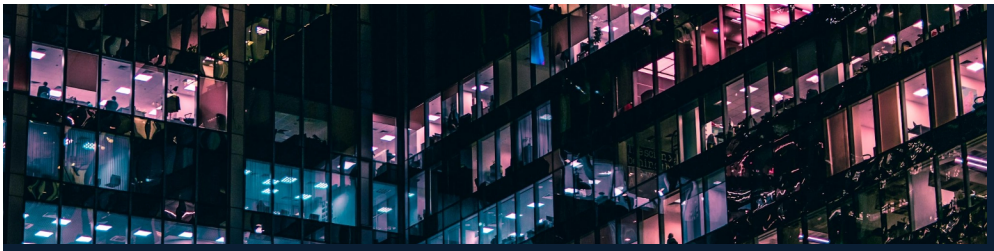
- Excessive manual approvals delayed project starts.
- Scheduling lacked visibility into technician availability and job status.
- Data was scattered across paper forms, emails, and disconnected spreadsheets.

The challenge was to introduce operational rigor and automation without disrupting daily field activity or service continuity.

HAWKINS AND HAYES APPROACH

The *Process Optimization* engagement was structured in three practical phases, balancing technical improvement with human adoption:

- **Workflow Mapping:** Documented existing processes across bidding, materials management, installation, and service dispatch. Quantified time waste, approval bottlenecks, and redundant hand-offs.



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WHY PROCESS OPTIMIZATION MATTERS

Operational efficiency isn't about cutting cost — it's about enabling control. Hawkins & Hayes helps business owners convert complexity into repeatable, data-driven systems that support growth, protect margin, and free leadership to focus on strategy rather than firefighting. Sustainable profitability begins when process becomes predictable.

CLIENT REFLECTION

"We didn't just make things faster — we made them repeatable. Hawkins & Hayes helped us create discipline in the business without bureaucracy. The impact was immediate and visible."

HAWKINS AND HAYES APPROACH CONTINUED

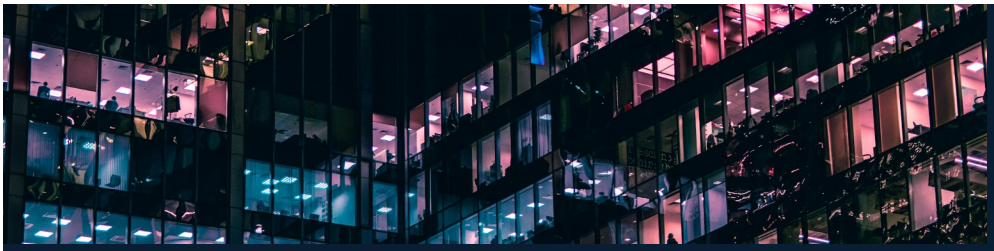
- **Redesign & Standardization:** Introduced digital job cards and automated scheduling tools with GPS integration. Established clear SOPs for procurement, field execution, and quality checks. Built real-time performance dashboards tracking project progress, utilization, and gross margin.
- **Training & Change Management:** Delivered workshops and coaching to embed accountability and reinforce new habits. Introduced KPIs linked to project efficiency, client satisfaction, and first-time fix rates.

KEY FINDINGS

Insight	Description	Outcome
Non-Billable Hours	21% of technician time lost due to scheduling gaps and poor material staging.	Reduced billable utilization by nearly one day per week.
Approval Delays	Seven manual billing approvals added 3-5 days to project cycle time.	Slowed project starts and revenue recognition.
Field Reporting Variance	Inconsistent reporting formats caused invoicing lags of up to two weeks.	Cash flow disruption and client dissatisfaction.

LEARNINGS & NEXT STEPS

This engagement proved that scalability requires structure. By standardizing core workflows and empowering staff with data visibility, the client transformed reactive operations into a predictable, efficient system. The next phase ("Improve → System Alignment & Automation") will expand digital integration across finance and field operations, ensuring process discipline becomes embedded culture.



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TIMELINE & WORKING WITH HAWKINS & HAYES

WEEK

1-2 · Week 1–2 · Orientation & Alignment
We begin with clarity — defining objectives, stakeholders, and value metrics. A kick-off workshop establishes scope, data access, and cadence of communication.

3-6 · Week 3–6 · Discovery & Diagnostics
Our team maps current-state performance through data analysis, stakeholder interviews, and benchmark comparisons. Early findings highlight where value is created, lost, or hidden.

11-14 · Week 7–10 · Design & Recommendation
Insights become solutions. We develop targeted initiatives — operational, financial, and leadership — prioritized by impact and feasibility.

7-10 · Week 11–14 · Implementation & Enablement
Change is embedded, not imposed. We standardize workflows, train teams, and integrate dashboards for visibility and accountability.

15+ · Week 15+ · Realization & Ongoing Support
Once improvement is sustained, we help clients track enterprise value, communicate results to stakeholders, and prepare for strategic options such as growth, transition, or exit.

START THE CONVERSATION

Start the conversation to discover how Hawkins & Hayes helps business owners quantify, protect, and grow enterprise value — from baseline clarity to strategic realization.

Hawkins & Hayes

Transforming operational progress into measurable enterprise value.

A STRUCTURED PATH FROM INSIGHT TO ENTERPRISE VALUE

When clients engage Hawkins & Hayes, they experience a disciplined, transparent process built to convert performance improvement into measurable enterprise value. Every engagement follows a clear execution rhythm and a proven methodology — ensuring focus, alignment, and accountability from day one.

THE HAWKINS & HAYES METHODOLOGY

Measure → Improve → Realize

A continuous cycle designed to identify opportunity, build capability, and convert progress into long-term enterprise value.

Phase	Focus	Modules
MEASURE	Establish truth before change	Operational Baseline Data & Diagnostic Analysis Opportunity Identification
IMPROVE	Embed systems, structure, and scale	Process Optimization System Alignment & Automation Capability & Accountability
REALIZE	Convert progress into enterprise value	Sustain & Scale Value Tracking & Reporting Strategic Realization

OUR PRMOISE

Clarity — Independent insight revealing where and how value is created.

Discipline — Systems and structure that sustain performance beyond engagement.

Results — Tangible financial and organizational impact that enhances valuation readiness.