

# REVENUE OPERATIONS TRANSFORMATION CASE

## Roofing Company Revenue Automation System



### TARGET NICHE

**US ROOFING COMPANY DOING \$500K–  
\$3M/YEAR IN REVENUE.**

### THE PROBLEM (BEFORE SYSTEM)

The roofing company was experiencing:

- Leads coming from website forms, calls, and Facebook ads but no central tracking
- Sales reps forgetting to follow up on sent estimates
- Missed calls = lost jobs
- No visibility of pipeline or deal status
- Slow response time to new inquiries (sometimes hours)
- No structured follow-up after sending estimates
- Owner unable to forecast revenue

Result: Lost deals, inconsistent revenue, operational chaos.

### THE SYSTEM BUILT (REVENUE ENGINE INSTALLATION)

A complete automated revenue system using:

- HubSpot CRM — pipeline & deal tracking
- Zapier — automation workflows
- Google Forms — lead capture
- Twilio — instant SMS responses
- Gmail — team communication

### PIPELINE STAGES DESIGNED

1. New Lead
2. Contacted
3. Inspection Scheduled
4. Estimate Sent
5. Follow-Up
6. Closed Won
7. Closed Lost

This gave full deal visibility to the owner.



*The main purpose of Revenue operations is to break down silos between departments to create a seamless customer experience and ensure consistent growth.*

#### **Joseph Muturi**

RevOps and Growth Systems,  
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### AUTOMATION LOGIC IMPLEMENTED

#### WORKFLOW 1 — LEAD CAPTURE SYSTEM

**Trigger:** Form submission

**Actions:**

- Create Contact in CRM
- Create Deal in "New Lead"
- Send instant email
- Send instant SMS
- Create task: Call within 5 minutes

**Business Impact**

- Immediate response
- Faster lead engagement
- Reduced lead leakage

#### WORKFLOW 2 — MISSED CALL RECOVERY

**Trigger:** Missed call

**Actions:**

- Automatic SMS:

"Sorry we missed your call. How can we help with your roofing project?"

**Business Impact**

- Captures lost opportunities
- Improves customer experience
- Increases booked appointments

### REVOPS SOLUTION

A structured system that aligns lead generation, sales execution, and performance tracking.

### KEY INSIGHT

The problem was not leads.

The problem was no system to convert and manage the leads.



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### WORKFLOW 3 — INACTIVE DEAL ALERT

**Trigger:** No activity for 7 days

**Actions:**

- Notify sales rep
- Notify manager
- Create follow-up task

**Business Impact**

- Prevents deal stagnation
- Improves pipeline hygiene
- Increases close rates

### WORKFLOW 4 — ESTIMATE FOLLOW-UP SEQUENCE (HIGH ROI)

**Trigger:** Deal moved to Estimate Sent

**Timed actions:**

| Day | Action          |
|-----|-----------------|
| 0   | Email + SMS     |
| 2   | Reminder SMS    |
| 5   | Follow-up Email |
| 10  | Final Email     |

**Condition:**

- If deal becomes Closed Won → sequence stops.

**Business Impact**

- More estimates converted
- Less manual follow-up
- Improved sales consistency

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### WORKFLOW 5 — AI EMAIL DRAFTING

**Trigger:** New inquiry or estimate request

**AI Generates:**

- Personalized response
- Follow-up email
- Estimate explanation
- Re-engagement message

**Business Impact**

- Faster communication.
- Personalized responses.
- Consistent messaging.
- Reduced administrative work.

### WORKFLOW 6 — AI LEAD QUALIFICATION

**Trigger:** New Lead Submission

**The AI evaluates each lead using:**

- Service Requested
- Timeline
- Budget Status
- Decision Maker Status
- Revenue Potential
- Urgency Level

**Business Impact**

- Faster response times to high-value leads
- Improved sales efficiency
- Reduced time spent on unqualified leads
- More consistent lead prioritization
- Better CRM data structure
- Higher conversion rates from qualified leads

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### WORKFLOW 7 — AI CALL SUMMARY

**Trigger:** New Sales call file

#### Before System

- Manual note-taking
- Inconsistent documentation
- Missed action items
- Delayed CRM updates
- Difficult forecasting

#### After system

- Standardized call summaries
- Faster documentation
- Consistent CRM records
- Better lead qualification
- Improved sales accountability
- Faster follow-up
- Enhanced revenue forecasting

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### 8.EXECUTIVE KPI DASHBOARD

The objective is to Provide leadership with real-time visibility into business performance.

The Dashboard includes:

- Total Leads
- Pipeline Value
- Revenue
- Close Rate
- Deals by Stage
- Revenue Forecast
- Stuck Deals
- Lead Sources

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### BUSINESS IMPACT

#### Operational Improvements

- Eliminated manual lead entry.
- Standardized customer follow-up.
- Reduced response times.
- Automated repetitive sales tasks.
- Improved CRM data quality.
- Increased management visibility.

#### Revenue Improvements

- Reduced missed sales opportunities.
- Increased estimate follow-up consistency.
- Improved lead qualification.
- Enhanced forecasting accuracy.
- Faster sales response.
- Better customer engagement.

### ROI PROJECTION

Assumptions (typical roofing numbers):

- 40 leads/month
- Average job value: \$12,000
- Close rate before system: 15% (6 jobs)
- Close rate after system: 25% (10 jobs)

**Extra 4 jobs × \$12,000 = \$48,000/month  
additional revenue**

System cost: **\$5,000–\$8,000 one-time**

**ROI achieved in first month.**

### REPORTING DASHBOARD

#### Track:

##### Leads

- Leads this month
- Lead source

##### Sales

- Estimates sent
- Close rate
- Revenue won

##### Operations

- Missed calls recovered
- Follow-up completion rate
- Deal aging

### FINAL OUTCOME

The roofing company now has:

- Predictable follow-ups
- Structured pipeline
- Instant responsiveness
- Clear revenue forecasting
- Zero forgotten leads

A true **Revenue Engine**, not just a CRM.