

CRM & Workflow Software

Ecology Co-op

Delivering efficient project delivery and financial visibility for an ecological consultancy

The Customer

The Ecology Co-op provides ecological services for both public and private sector clients, helping to manage environmental impacts of development and supporting conservation efforts. Their services include ecology surveys, appraisals, and protected species assessments.

Founded in 2014 by Paul Whitby, the organisation has grown into a highly reputable consultancy, boasting a dedicated team of over 20 experienced ecologists.

Their Pain

The Ecology Co-op faced several challenges due to the intricate and compliance-heavy nature of their work. Project quotations often required detailed scoping and multiple revisions. Tracking time spent on specific project activities was often inconsistent, making it difficult to determine what had been invoiced and what remained outstanding.

Each consultant had their own working methods, resulting in inconsistent data, limited visibility over financial performance, and unreliable project reporting. There was no streamlined process to manage enquiries, quotations, health and safety assessments, or fee recovery.

Our Solution

In close collaboration with The Ecology Co-op, Blue Wren implemented a tailored solution using our Flight platform. This system introduced a centralised CRM that allowed for the consistent handling of enquiries, generation of standardised quotations, and streamlined customer approvals.

The software automated project lifecycles while also managing health and safety documentation across site visits. Approved quotes automatically converted into live projects, with a full breakdown of services and stages.

Flight was integrated with QuickBooks Time for detailed time tracking and QuickBooks for invoicing, providing a live overview of job progress and project financials.

Continuous system refinement ensures the solution evolves alongside the Ecology Co-op's operational needs.

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Key Features



Standardised quotations and full revision history



Full project management from enquiry to invoicing



Financial reporting at a project level, including WIP



Automated communication workflows



Scheduling tools with calendars



Task checklists tailored to job types and stages



Document storage linked to job records



API integration with QuickBooks and QuickBooks Time



Impact

"Before Flight, our workflows were inconsistent and scattered across different platforms. Blue Wren delivered a custom system that brought everything together - quotes, schedules, time tracking, and invoicing. We now benefit from clear, standardised processes and a comprehensive view of financial performance.

Thanks to the integration with QuickBooks and ongoing system improvements, our operational efficiency keeps getting better."

Paul Whitby
Founder and Director

Want to know more about our CRM and Workflow Software?

Get in touch or book a free demo

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blue wren 

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