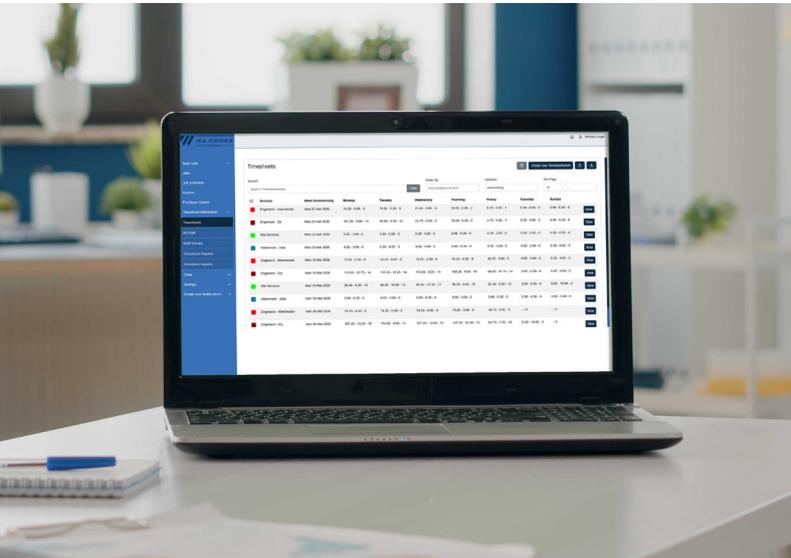


CRM & Project Management Software

WA Cooke

Bringing clarity, control and consistency to complex engineering projects.



The Customer

The WA Cooke Group is a nationwide engineering company delivering steel fabrication and mechanical installation services across the UK.

Established in 1926, the business works across a range of engineering sectors including municipal water treatment and clean energy.

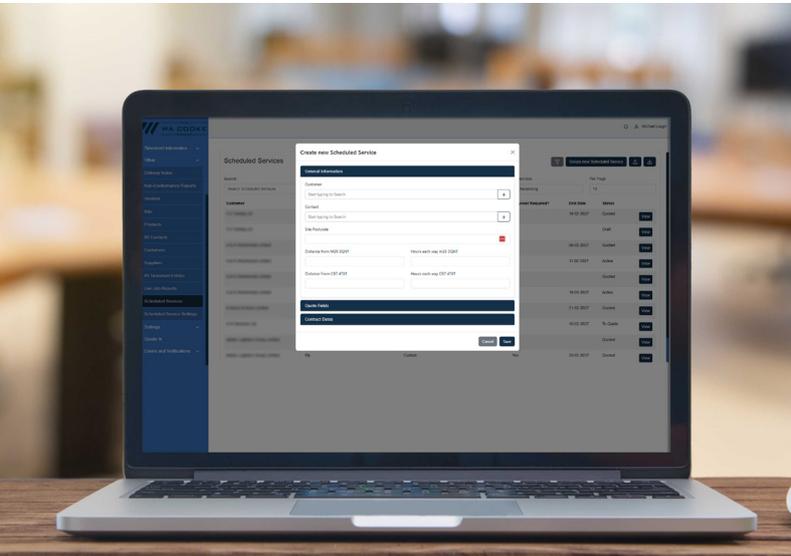
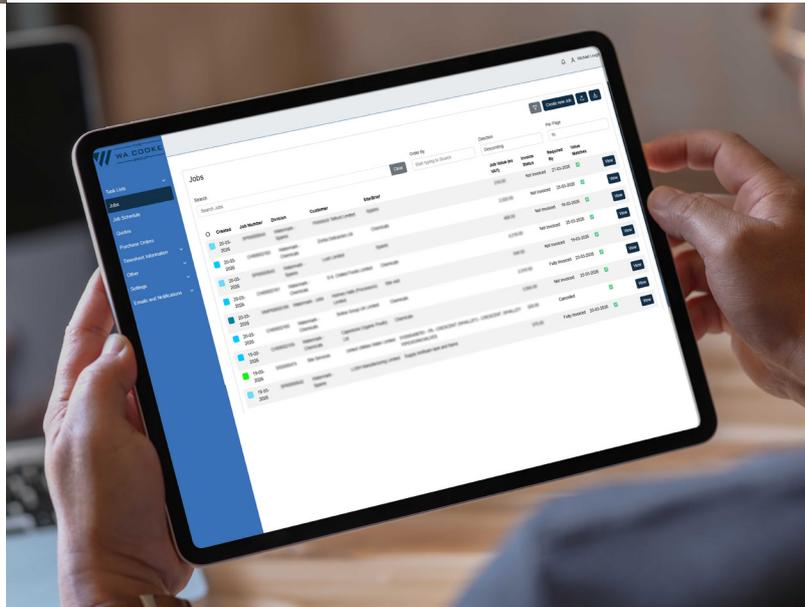
With fabrication facilities in Manchester and Ely, and site services operating nationwide, WA Cooke delivers projects ranging from structural steelwork and platforms through to pipework, plant assembly and process equipment manufacture.

Their Pain

WA Cooke needed better visibility and coordination across their quoting, project management and operational processes.

Key activities such as quotations, project tracking, timesheets and documentation were managed across multiple spreadsheets and systems. This created an administrative overhead and made it difficult to maintain a clear overview of project progress, costs and documentation.

The company required a central system that could connect their sales, projects and operational workflows while supporting the documentation and reporting requirements of engineering projects.



Our Solution

Using Flight's configurable platform, we developed a CRM & Project Management system tailored to WA Cooke's engineering operations.

The software connects the entire project lifecycle. From enquiry and quotation through to project delivery and financial management. Teams can manage quotes, projects, timesheets, procurement and documentation in a single platform, improving visibility and coordination across the business.

Integration with Xero ensures financial data flows seamlessly between systems, reducing duplication and improving reporting.

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Key Features



CRM functionality including contact management and communication history



Invoicing and purchase order management



Project management including delivery notes, job hours reporting and profit margin analysis



Technical reviews, inspection records and non-conformance reports



Quoting system with quote revision tracking



Maintenance service schedules



Timesheet management



Product database and inventory management



Integration with Xero



Impact

“Our collaboration with Blue Wren has resulted in a system that reflects the way our engineering projects are delivered.

By bringing together quoting, project management, timesheets and financial processes into a single platform, we now have far better visibility across our projects and operations. The system allows our teams to manage documentation, track project performance and maintain consistent processes across the business.

The integration with Xero has also streamlined our financial workflows and reduced duplication of data.”

Billy Cooke, Director
WA Cooke

Want to know more about our CRM & Project Management Software?

Get in touch or book a free demo

Call: 01772 920 777 Email: hello@bluewren.co.uk

blue wren

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