



briq

# Client Case Study:

## Shamrock Electric + Briq

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### Background:

Shamrock Electric Co. is a family-owned union electrical contractor founded in 1957, working in Northern Illinois. They grew from a commercial and industrial contracting company to a trusted full-service electrical contracting firm specializing in high-rise buildings. Their electrical contracting services include commercial, residential, industrial, design-build, and green electricity.

### Systems:

Accounting: Job Cost

Estimating: Accubid Estimating

Other: Excel, Box, Bluebeam

### Challenge:

The challenge Shamrock Electric was facing was twofold. Firstly, the accounting software Shamrock Electric uses is old, niche and was created without interconnectivity in mind.

Written by CPAs specifically for electrical, plumbing, and mechanical contractors, it's a perfect accounting point solution for Shamrock Electric. But, it's missing the ability to connect and integrate with other systems and reports were difficult to generate, so they needed a workaround. Building the WIP could take at least two hours to complete every two weeks as data had to be collected and collated manually.

“What I was looking for in Briq was something to lighten up my time, give me some of my day back.”

— **Kevin O'Shea**  
CEO / CFO  
Shamrock Electric Co. Inc.

Secondly, acting in a dual role of CFO and President of Shamrock Electric, Kevin O'Shea needs to read the business numbers in two very different ways. As CFO, he wants to be

in the weeds with the numbers, analyzing what they mean and closely tracking critical numbers like project complete percentage. As President, he needs a more bird's eye view to see the bigger picture and understand the broader business performance. He needed to spend less time generating reports and more time analyzing them.

“Saving me one day a month is huge. Every day we’re playing catch up, and Briq is a massive partner in getting ahead and giving me time back.”

– Kevin O’Shea

## Solution:

Briq worked directly with Kevin to identify what reports he needed to generate and built them to his specifications. Together they identified the three reports that Kevin would need: WIP, job cost report, and revenue forecast. The challenge for the Briq team then was working within the Job Cost software, which they hadn’t worked with before, and the antiquated database it was built on.

Data mapping was difficult to do in this older system so the Briq implementation team took extra time in the data discovery stage. Determining what data they needed to pull and where it was located, and then organizing the extraction with automations proved to be a challenge, but the Briq team soon found a way to navigate it effectively.

Testing success at first proved to be difficult as Briq is a more technologically advanced system than Excel and was a change in the way of working for Shamrock Electric. Kevin needed to know how to navigate Briq to find the reports he needed and understand the options presented to him.

The Briq implementation team spent time training Kevin on the software until he was a bonafide Briq expert and could work in Briq as easily as he could in Excel. Our Workflow tool was identified as being very helpful as it organizes all reports in one page on the Briq app.

With newfound confidence thanks to training from the team and trust in Briq software, Kevin was soon up and running smoothly, generating the information he needed in the way he wanted to see it.

The team is still working on building more custom reports for Shamrock Electric to allow them to analyze their business health with more visibility and access to statistics from past performance than ever before, so there is more to come.

“When we have everything up and running it’s definitely going to help me see into the business a lot better than I can now.”

– Kevin O’Shea

## Outcome:

“I’ve got a lot of initiatives that I want to do with Briq.”

– Kevin O’Shea

With Briq, Kevin saves at least a full day every month generating reports and can focus on using the data he is collecting rather than compiling it. Building the WIP used to take him two hours and now it takes only two minutes. Now done by automation bots, the report is more accurate and built on the most timely information available to the team. The WIP isn’t where this stops though. Shamrock Electric is due to go live with their

Job Cost Report in Briq soon. The report takes between three to four hours to build manually every two weeks, but from the recent testing in Briq, our software will generate it in two minutes. Once set up, Shamrock Electric will be able to produce this report as they need. All this time saving is invaluable to Kevin and once the Job Cost Report is live he will be looking to bring more departments onto Briq.

Briq is giving Shamrock Electric more visibility into their business and more time to analyze the data they are collecting. It's not just software, it's a valuable member of the team.

### **Testimonial:**

**“The possibilities of what Briq can do with our information are limitless.”**

Kevin O'Shea,  
CEO / CFO

