OPULENT BOOKKEEPING SERVICES

Empowering Businesses with Financial Clarity

CONSTRUCTION TRADES CASE STUDY

JOB LEVEL MARGIN CLARITY

OVERVIEW

This trades client already had a bookkeeping firm and received monthly financials, but the reporting did not show profitability at the project level. With multiple teams working on different jobs at the same time, the owner needed more than standard financial statements. Opulent Bookkeeping came in through an advisory role to build the missing layer: project-level reporting that connected revenue, materials, and payroll labor to actual job performance.

CHALLENGE

The business had financial reports, but they were not detailed enough to support operational decisions. The owner needed to understand which projects were profitable, which crews were performing efficiently, and whether estimated labor was aligned with actual payroll hours.

1. Monthly financials did not show profitability by project
2. Multiple crews and jobs made performance difficult to compare
3. Estimated job time could not be clearly measured against actual labor hours
4. The owner lacked visibility into which services were profit-driving versus profit-draining

WHAT WE FOUND

Once project-level tracking was created, the numbers showed that several jobs were either not profitable or not as profitable as expected. The issue was not only pricing — it was operational execution. A side-by-side review of proposal estimates against actual payroll hours revealed that labor efficiency was a major driver of lower margins.

1. Some projects were producing weaker margins than the owner believed
2. Actual payroll hours exceeded estimated labor time on certain jobs
3. Crew speed and execution varied across projects
4. Certain services consumed too much time compared to the profit they produced

OUR APPROACH

Opulent Bookkeeping used the client’s proposal software to create a practical reporting structure that could be maintained without disrupting daily operations. We built a repeatable method to track project performance using data from multiple systems, then connected that information back to labor efficiency and service profitability.

- **Created a standardized project breakdown using proposal data**
- **Tracked revenue, material expenses, and payroll labor by project**
- **Implemented an auto-generated reporting method to simplify daily data entry**
- **Compared estimated labor time against actual payroll hours to identify margin leakage**

RESULTS

The owner gained the project-level clarity needed to manage profitability with facts instead of assumptions. The reporting revealed where margins were slipping, which services were worth keeping, and where labor performance needed to improve.

- **Built a repeatable project-level profitability tracking system**
- **Identified labor inefficiency as a key cause of margin erosion**
- **Supported targeted retraining and staffing decisions**
- **Helped the owner focus on higher-margin services and reduce profit draining work**

Key Metrics

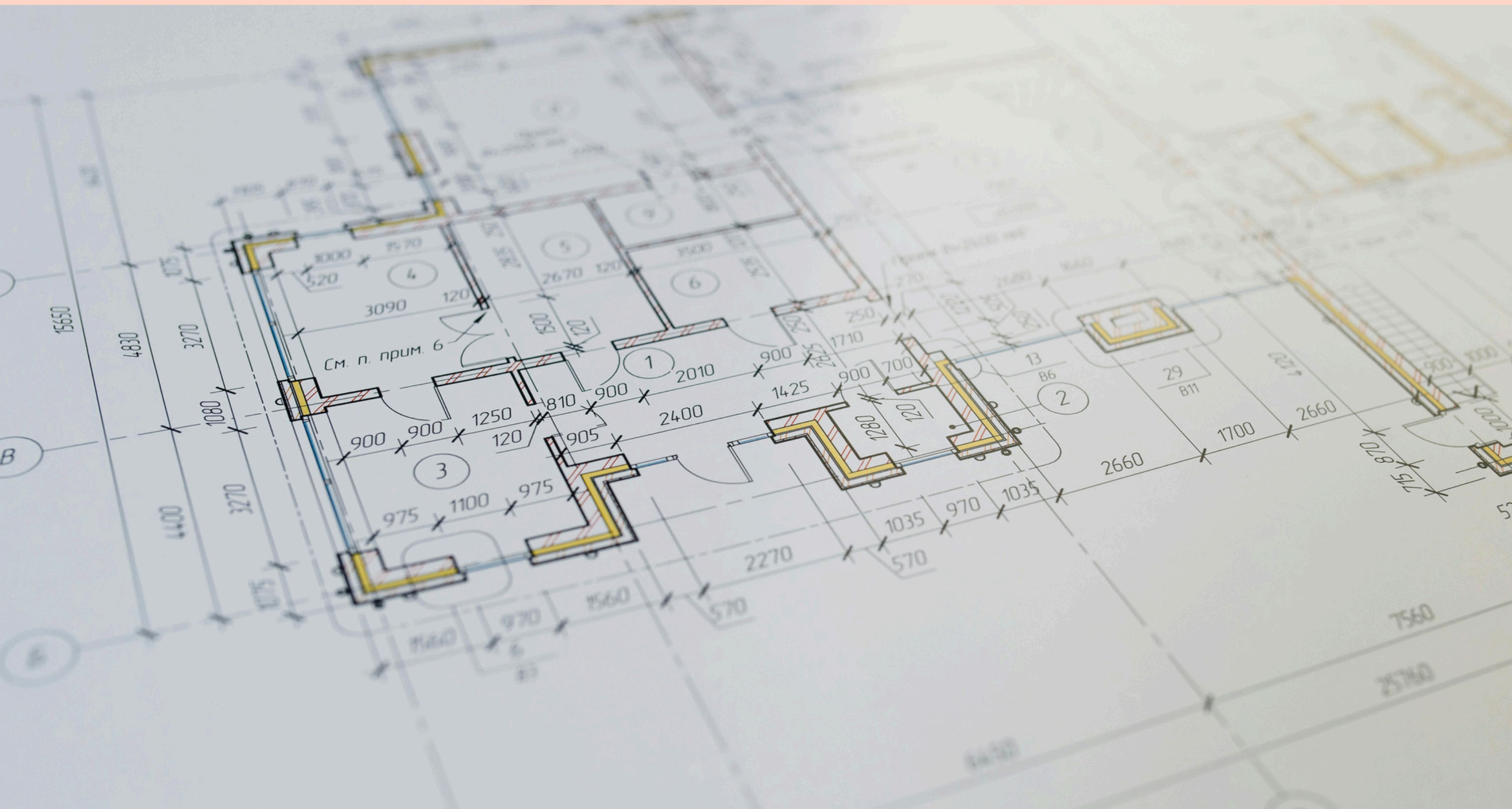
OVERVIEW

PROJECT LEVEL	PROJECT TRACKING	ESTIMATE VS. ACTUAL	PRIMARY PROFIT
100%	100%	100%	100%
PROFIT VISIBILITY	FRAMEWORK BUILT	LABOR REVIEW ADDED	DRIVERS IDENTIFIED

Future Plans

The next phase is to use project-level reporting as an ongoing management tool to protect margins, improve crew performance, and make better service decisions.

- **Review project profitability consistently, not only at month-end**
- **Monitor estimate-versus-actual labor hours by crew and job type**
- **Continue shifting focus toward higher-margin services and stronger-performing teams**



Ready to see what your numbers are really telling you?
Schedule Your Complimentary Consultation

Clean books are only the starting point. The real value comes when your financials are accurate, organized, and clear enough to support better decisions.

During your complimentary consultation, we'll discuss your current bookkeeping process, where reporting may be unclear, and what it would take to create a stronger financial foundation for your business.

What We'll Review

- Current bookkeeping system and reporting challenges
- Cleanup, catch-up, or monthly close needs
- Profitability visibility and margin concerns
- Recommended next steps based on your business stage and complexity

Scan to Schedule

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Confidentiality-First - A Pre-Engagement NDA is available upon booking so you can share sensitive financial details comfortably and securely.