

Client Case Studies

Romans Group



Scaling a multi-disciplinary property business without losing control

Romans Group is a leading property services business operating across London, the East of England, the Home Counties and Wales. From a foundation in residential sales and lettings, the group has grown into a diverse operation covering auctions, mortgage and financial advice, surveying, new homes marketing, land development and town planning, with around 400 staff across 24 offices.

Growth at that scale creates real operational complexity. Multiple business lines, multiple cost centres and a rapidly expanding team meant Romans needed a financial and operational platform that could keep pace, without the manual effort and limited visibility that had characterised earlier ways of working.

With more than 34 years of experience and a multi-award-winning team, Pinnacle worked closely with Romans Group to create a connected, scalable platform that gave the business the visibility, control and efficiency its growth demanded, and has continued to support it as a trusted partner ever since.

The challenge: Complexity was outpacing the systems

Romans had grown significantly, but its financial and operational processes had not kept up. The business was running across multiple entities with different cost structures, and the systems in place were creating unnecessary friction.

Limited visibility across the group

With multiple business lines operating under one group, Romans needed a single, reliable view of financial performance across all four businesses. Without it, management decisions were being made on information that was either incomplete or out of date.

Time-consuming manual processes

Much of the financial administration relied on manual effort. Timesheets, for example, were collected and processed at the end of each month, which meant management had no real-time picture of how staff time was being spent. This made it harder to manage resources effectively and slower to identify problems.

Billing gaps and lost time

The manual nature of time recording also had a direct commercial impact. Without a reliable system for capturing billable time, some activity was inevitably going unrecorded, with knock-on effects on billing accuracy and revenue.

Document handling that slowed queries down

Processing financial queries and locating supporting documents was time-consuming, adding unnecessary delay to routine administration and drawing resource away from higher-value work.

A business with ambitions that required the right foundation

Romans had been named Sunday Times Estate Agency of the Year and Lettings Agency of the Year, and had clear ambitions to keep growing. That required a financial and operational platform that could scale with the business, managed by a partner who understood its requirements and could help it extract ongoing value.



Choosing a partner for the long term

Romans had worked with Pinnacle since 2007, and when the business needed to move to a more capable platform, it was a natural continuation of that relationship.

Pinnacle had already demonstrated it understood Romans' operation. The team brought knowledge of the property sector, practical experience of implementing financial and project management solutions for complex, multi-entity businesses, and a commitment to maximising the value of every engagement over the long term.

The combination of a suitable platform and a partner the business already trusted gave Romans the confidence to proceed.

"Romans is a dynamic company and standing still is not an option for us. Pinnacle maximises the value of our investment as a trusted extension of our team."

Michael Palmer, Finance Director, Romans Group



Shaping the right platform for a complex business

Pinnacle worked with Romans to implement a connected financial and project management platform across all four of the group's businesses.

The approach was shaped around Romans' specific requirements, including multi-entity financial consolidation, project accounting to support the professional services operations, and time recording that gave managers a real-time picture of how their teams were working.

Document management was integrated to reduce the time taken to locate supporting information and handle queries, and the platform was structured to accommodate Romans' varied cost centre configurations across business lines.

By building the solution around how Romans actually operated, Pinnacle ensured the platform would deliver practical, day-to-day value from the outset, not simply replicate what had existed before.

The impact on the business

A single view of the group

Romans gained a central, reliable point for monitoring financial performance across the entire group. Management could see how all four businesses were performing without needing to pull together information from multiple sources.

Real-time visibility of how time was being spent

Rather than waiting until the end of the month for timesheet data, managers could see by the end of each week how their teams had spent their time. This made resource management faster and more informed.

More billable time captured

Improved time recording meant more activity was captured within each billing cycle. This increased billing accuracy and helped ensure the business was collecting revenue it had previously been missing.

Faster query resolution

Integrated document management cut the time taken to handle individual queries significantly, reducing the administrative burden on the finance team and freeing up capacity for more valuable work.

A platform that scaled with growth

Romans' turnover doubled after implementing its new platform. The financial and operational infrastructure Pinnacle put in place gave the business the foundation it needed to manage that growth without losing control, and created the flexibility to continue developing its capabilities as requirements evolved.



The organisational impact

The transformation gave Romans Group a scalable, connected operational platform. The business gained:

- A consolidated view of financial performance across all four group businesses
- Real-time time recording and resource visibility for management teams
- Higher billing accuracy and improved revenue capture
- Faster document handling and query resolution
- Consistent financial processes across multiple cost centres and offices
- A flexible foundation to support continued growth and operational development
- An ongoing partnership with a trusted advisor who understands the business



A partnership built on understanding the business

Romans Group's transformation was not about implementing software. It was about giving a fast-growing, multi-disciplinary business the operational clarity and control it needed to keep scaling without losing efficiency or visibility.

Pinnacle's role was shaped by a relationship that predated the project and has continued beyond it. By understanding how Romans operates across its different business lines, Pinnacle was able to build a platform that worked for the whole group, not just the finance team.

The result is a business that has doubled in size on a foundation it can rely on, supported by a partner that continues to help it develop and improve.

With Pinnacle as its trusted transformation partner, Romans Group has the infrastructure, the insight and the ongoing support to keep growing on its own terms.

Ready to transform your organisation?

Pinnacle is a multi-award-winning business transformation partner with more than 34 years of experience helping organisations improve performance through better processes, connected technology and trusted advice.

Visit www.pinnacle-online.com to discover how Pinnacle can support your organisation's next stage of transformation.





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