

Simplicity equals success: Houston Engineering, Inc. powers growth and productivity with Unanet

Houston Engineering, Inc. (HEI) is a full-service consulting firm with 11 locations throughout the Upper Midwest. Since its inception in 1968, HEI has sustained consistent internal and external growth. When their prior ERP software was no longer supported, HEI sought a new software solution that could scale with them, supporting their needs as they grew. They wanted a system that could aid in making business easy without adding to their workload.

HEI selected Unanet as its' new ERP solution because of its aligned features and ability to improve project management, enhance collaboration, and increase overall efficiency. With Unanet's help, HEI has enhanced its reporting and analytics, seen a faster turnaround in billing, and managed growth more effectively.

Challenges

Like many businesses that experience growth, HEI faced an assortment of challenges:

- **Operational pressures:** Growth can often lead to operational challenges such as resource strain, staff shortages, and maintaining workflow efficiency. HEI faced these challenges firsthand as they continued to grow their business through acquisitions and by taking on more projects, which required them to adjust their management strategies and optimize resource allocations to maintain efficiency.
- **Time-consuming billing cycles:** Lengthy billing processes can impact operational efficiency and impact cash flow. HEI wanted to find a way to speed up the billing and collection cycle through more automated workflow management.
- **Data availability and reporting:** The reporting and availability of data is necessary to make good decisions. HEI sought ways to improve reporting and increase transparency in its data for better decision-making.



Headquartered in Fargo, ND, HEI provides a full range of civil engineering, surveying, environmental, planning, and technology consulting solutions for clients in North Dakota, South Dakota, Minnesota, Nebraska, and Iowa.

The Solution

Unanet supported HEI's goals through its unique set of features:

- **Access to real-time data to facilitate swift business decisions:** This feature allows businesses to make informed decisions quickly by having access to up-to-date information in minutes. HEI leveraged real-time data to enhance operational efficiency and respond promptly to changing market conditions.
- **Customizable dashboards enhanced for data interpretation:** Unanet's customizable dashboards enable HEI's users to visualize data in a way that aligns with their specific needs. HEI developed dashboards that provide insights crucial for project management and resource allocation. According to Bethany Fraase, Director of Finance at HEI, "The dashboards have been very useful for us. You can put a lot of information into it and customize it to fit your needs. It's really nice that you can make it however you want."
- **Improved data presentation and availability:** Effective data presentation ensures the stakeholders can easily grasp important information. HEI's reporting tools have been designed to deliver clear and consistent data, enabling more transparency and effective communication across teams and clients.
- **Fine-tuned billing process accessible via a web platform:** An efficient invoicing process leads to better financial management and productivity. HEI project managers take advantage of Unanet's web-based invoicing system, which allows them to access the Bill Review functionality anywhere without delaying the billing process.

The Approach

HEI strategically implemented Unanet using the following process:

- **Using the Unanet Experience Center and virtual community for continued learning and support:** Unanet's Experience Center helped HEI learn and understand how processes work within the system. Recently, HEI began using Unanet's virtual community to tap into a wealth of resources and shared experiences to enhance team skills and stay updated on best practices.
- **Patiently exploring and mastering Unanet's software features to utilize its full capabilities:** The team at HEI has dedicated time to thoroughly understand Unanet's diverse features, allowing them to leverage the software to its full potential for project management and resource allocation.
- **Managing dashboards proficiently to optimize information accessibility and streamline data flow:** With the capabilities available within Unanet, HEI developed strong proficiency in dashboard management, enabling them to present critical information clearly and enhance the decision-making process across projects.

The Impact

Unanet's implementation fostered improvements in multiple high-impact business areas. Here's what HEI experienced following the transition:

- **Enhanced decision-making via real-time data access:** With real-time data access, project managers can make informed decisions promptly. HEI experienced improved project outcomes by utilizing live data to adjust strategies quickly.
- **Greater efficiency in the billing process:** HEI has reduced the amount of time it takes to get invoices out the door. Unanet offers a more streamlined billing system that decreases processing time significantly.
- **A notable increase in project management productivity:** By optimizing workflows, project managers can focus more on high-value tasks. HEI has seen a rise in productivity, allowing its project managers to take on more projects and increase overall utilization.
- **Streamline financial reporting and improved data accuracy:** Accurate financial reporting is crucial to effective project management and firm success. HEI has enhanced its reporting process through increased financial transparency, supporting better decision making.

HEI streamlined its workflows and enhanced project management efficiency with the help of Unanet. This partnership has led to improved communication and collaboration across teams, and with Unanet's support, HEI continues to successfully navigate through the challenges that come with growth.



I love Unanet's big picture numbers that I can pull easily."

– Gregg Thielman, President/CEO of HEI



Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for Architecture, Engineering and Construction firms. More than 4,000 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and accelerate business growth. All backed by a people-centered team invested in the success of your projects, people, and financials.