

SUCCESS STORY

American Forest Management Gains Flexibility and Increases Efficiency with Unanet A/E powered by Clearview



A NEW PLAYER EMERGES

After several years of searching and a few false starts, Crawford noticed a new player had emerged in the project-based ERP market: Unanet A/E powered by Clearview. “At first we moved slowly and cautiously with Unanet A/E because we’d had bad experiences with other ERP vendors during this process, but they were very patient, reassuring and willing to work through our challenges and find solutions,” says Crawford.

Ultimately, AFM selected Unanet A/E as their ERP solution. “The most important thing was that not only did they meet more of our needs out of the box than any other software, the things that were missing they were willing to work through – do customization, find a solution or create an update,” says Crawford. “Sometimes software vendors try to make you fit into the box, but instead of workarounds, Unanet A/E found solutions.”



“Because our company doesn’t fit neatly into any mold, we struggled to find a project-based ERP solution that would meet our needs. Unanet A/E was the only vendor that was willing to really listen to us and build the customizations we needed – with Unanet A/E, we didn’t have to change our business processes to make the solution work for us.”

**- Susan Crawford, Chief Financial Officer,
American Forest Management**

ABOUT AFM

American Forest Management operates the largest forest consulting and real estate brokerage firm in the United States, manages more than 4.7 million acres of privately-owned timberland, and has sold more than \$1.5 billion in real estate since 2005. AFM employs more than 250 people operating from 45 offices in 17 states. AFM is focused on meeting client needs by providing a complete range of forestry services including forest and land management, wildlife management, recreational leases, land sales and technical data support.

When leaders at American Forest Management (AFM) learned the ERP software they had been using was being discontinued, they reluctantly embarked on the search for a new solution.

However, AFM executives quickly found that as a forestry consulting firm, their company was unique in the world of project-based ERP. “We’re not the typical users of project-based software, yet we don’t fit anywhere in the cash-basis realm,” says AFM Chief Financial Officer Sue Crawford. “Initially, we had a lot of trouble finding ERP software that would fit our organization.”

SMOOTH, STEADY IMPLEMENTATION

In 2011, AFM began its implementation of Unanet A/E with a large-scale test. “Unanet A/E was able to transfer all our old data into test version, and we spent a lot of time learning the system, seeing how things worked and determining what customizations we would need to make the transition as seamless as possible,” says Crawford.

Once the needed customizations were identified, AFM worked closely with Unanet A/E to make the necessary adjustments, including changes to the credit card reconciliation program, custom reports, and customized revenue allocation models. “The company’s founders and programmers were really on the front line of this,” says Crawford. “The great thing about Unanet A/E is they are small enough to listen to suggestions and be very hands-on through the entire process.”

When AFM rolled out Unanet A/E, the feedback was instantly positive. “The implementation was very smooth and fast, and everyone agreed Unanet A/E was very user-friendly,” says Crawford.

A CHANGE FOR THE BETTER

In the years since the rollout of Unanet A/E, AFM has achieved several business benefits, including access to real-time financial data. With their previous software, viewing financial data before the close of the month was extremely time-consuming. Now, users can easily view data at any time. “Our executives use the real-time data to get a picture of

the month before it posts and see how reality lines up with projections,” says Crawford. “Managers no longer have to call us to learn who paid and who didn’t – they can easily log on and drill down to see the exact data they need.”

AFM’s finance department is also saving time and money with Unanet A/E. The ability for users to self-service secure financial data means the time accounting staff used to spend answering data-related questions is freed up to focus on more strategic tasks. Also, the department has been able to increase efficiency by writing some of its SQL scripts; for example, they’ve written scripts that give them the ability to interface directly with several of their clients’ billing and accounting programs. Finally, Unanet A/E has improved AFM’s billing process. “Now, every time managers log on they can see all their open projects,” says Crawford. “When you run 3,000 projects at the same time it can be easy to forget to bill a small project – Unanet A/E ensures that doesn’t happen.”

Financially, Crawford says AFM is coming out ahead with Unanet A/E. “In addition to the efficiencies we’ve gained, the costs for Unanet A/E are very similar to what we were paying and much less than the software our prior vendor was trying to force us into. Plus, the pricing on the customizations we needed was very reasonable – there’s no sticker shock after the fact.”

Though they were forced to make the change to a new ERP solution, AFM executives now feel it was a change for the better. “We recommend Unanet A/E all the time,” says Crawford. “We’re very happy we made the switch, and if you asked our staff or field managers they would say the same thing.”

After implementing Unanet A/E powered by Clearview, American Forest Management:

- Delivered a customized, project-based ERP solution to meet AFM’s unique needs as a forestry consulting company.
- Enabled AFM to smoothly transition from the discontinued ERP solution they had been using to Unanet A/E
- Improved visibility of financial data throughout the company with real-time reporting and secure data access for approved users.
- Increased efficiency across the organization with user self-service capabilities, faster reporting and simplified end-of-month processes.
- Achieved cost savings through lower total cost of ownership, efficiency gains and billing improvements.



Unanet is a leading provider of ERP solutions purpose-built for Government Contractors, A/E, and Professional Services. More than 2,000 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.



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