

From bottlenecks to breakthroughs: The playbook for how one CFO scaled operations and tripled his team's workforce with Unanet's help.

Mark Bertsch is a senior leader and chief financial officer (CFO). His previous architectural design firm was also successful and found itself expanding rapidly. The challenge they faced was that outdated systems and inefficiencies were holding the organization back. Month-end closes stretched far too long, timesheets were incomplete, and project data wasn't available when it mattered most. For Bertsch, the stakes were clear: if the firm was going to keep growing, they needed to enhance their processes and create a strategic, data-driven framework to support long-term growth.

That's when they turned to Unanet. With Unanet's all-in-one platform, Bertsch helped the organization transform its hectic operations into an efficient and scalable system – providing a blueprint for CFOs seeking operational excellence and positioning the company to triple its workforce.

Challenges

Bertsch encountered several critical challenges that threatened to stifle the firm's growth. Each of these obstacles limited the firm's ability to maintain operational efficiency and stay on track with its aggressive expansion goals:

- **Lengthy month-end close processes:** Month-end closes were taking well over a month and sometimes two months, preventing leadership from gaining timely insights into business performance. Bertsch noted, "Month was being closed in 50-60 days, which didn't give us any insight into the business."
- **Delayed timesheet submissions:** Employees frequently submitted timesheets up to two months late, leading to incomplete and inaccurate data on labor utilization.
- **Manual, error-prone processes:** The firm relied on outdated spreadsheet-driven methods for billing and project tracking, slowing down operations and leaving room for costly errors.
- **Inability to scale:** The lack of scalable tools made it difficult for the firm to manage its rapid growth. Bertsch said, "There's no way we could have grown without the systems Unanet put in place."

Bertsch sought a solution to simplify the firm's financial processes and enable future growth without adding unnecessary complexity.

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Our growth was only possible because Unanet provided a system that scaled with us.”

– Mark Bertsch, CFO

Mark Bertsch is currently the CFO at AE Works where, as in his previous roles, he is driving growth with Unanet.

The Solution

After realizing the magnitude of the tests they were facing, Bertsch turned to Unanet ERP AE and Unanet CRM for a unified, all-encompassing solution. Unanet's platform provided the essential tools and features that allowed the firm to tackle their issues head-on:

- **Automated time tracking:** Unanet's timekeeping feature streamlined the collection and approval of timesheets, which had previously caused major delays. As Bertsch explained, "What I started to do right out of the gate was work on collecting timesheets and putting some rigor in place."
- **Real-time project insights:** Unanet offered real-time tracking of labor utilization, enabling the firm to make better forecasting and

management decisions. This gave Bertsch the visibility needed to understand project health throughout the month, instead of waiting for month-end data.

- **Scalable operations:** Unanet's tools were designed to scale, which allowed the firm to grow its workforce significantly while keeping operations lean.
- **Faster month-end closes:** With Unanet, the firm was able to drastically reduce the time it took to close out their books each month, helping the team make timely and informed financial decisions.

Unanet became the key solution to unlocking efficiency and scalability.

The Approach

With Bertsch leading the charge empowered by a responsive support team from Unanet, implementation was a seamless and structured process. This allowed the team to get up and running quickly. The firm was able to simplify its processes and integrate Unanet's tools into their daily operations with ease:

- **Easy-to-use timekeeping processes:** Setting up Unanet's automated time tracking feature led to the timely submission and approval of timesheets, significantly reducing the delays the firm had previously experienced.
- **Improved forecasting with project management tools:** Unanet's integration with the firm's existing project management workflows allowed for more accurate forecasting and resource management. According to Bertsch, "Our utilization report really helped us see what was happening throughout the month."
- **Responsive customer support:** Unanet's dedicated customer service team provided ongoing support throughout the implementation process, ensuring that the platform was set up to meet Bertsch's specific needs.
- **Data migration and process overhaul:** Transitioned from manual, spreadsheet-based processes to a more unified system helped Bertsch and the team streamlined billing and accounting.

With Unanet's support, Bertsch helped oversee the firm's quick adoption of the new platform. They began seeing the benefits almost immediately.

The Impact

By implementing Unanet, Bertsch was able to overcome the firm's operational challenges and achieve impressive results. The platform not only streamlined day-to-day operations but also supported the company's ambitious growth strategy:



Grew the company's workforce by 25%: The firm's New York office increased its number of employees by three times, a remarkable threefold increase that wouldn't have been possible without Unanet's scalable tools. Bertsch remarked, "We took our New York office from its low COVID days of 28 people and we grew it to 95." This enabled the New York office to be more effective and productive – and when factoring in the firm's entire workforce of 262, it accounted for a 25% growth in overall staff.



Improved timesheet compliance: Unanet's automated system ensured that timesheets were submitted and approved on time, providing accurate data for decision-making.



Dramatically reduced close times: The month-end close times were reduced from nearly two months to a much more manageable timeframe, allowing leadership to make informed decisions in real time.



Efficient billing processes: Despite handling significantly more invoices, the firm's overall billing processes became smoother, helping them avoid the need for additional administrative staff. Bertsch noted, "I would have been in a world of hurt if I had two or three hundred invoices I was manually sending out a month, but with Unanet, I was able to automate the process."

Bertsch has since departed the firm, but the utility of Unanet prompted him to take it to the next stop on his professional journey. And the lessons from his usage of Unanet offers a powerful playbook for CFOs looking to optimize their financial and operational strategies. By adopting Unanet, Bertsch's firm was able to overcome inefficiencies, simplify critical processes, and scale their business to meet growing demand – all while staying lean and agile.

For CFOs aiming to future-proof their organizations, Bertsch's success highlights the importance of embracing scalable solutions that deliver both immediate operational wins and long-term growth opportunities.

As Bertsch noted, "Without the systems Unanet put in place, we would have never been able to grow the way we did." For finance leaders seeking to transform their operations, Unanet provides the tools to enable growth, boost efficiency, and position companies to thrive in a fast-paced, competitive market.



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