

Bringing it all together: Wendel Companies increases profit and drives growth using Unanet

Wendel Companies is a successful multidisciplinary firm. To escalate their success, they looked to overcome challenges related to disconnected systems and inconsistent data. They needed a way to unify their operations and improve project visibility. Known for their collaborative approach, Wendel needed a system that could support their complex, multi-entity structure while allowing their teams to stay connected and work efficiently.

So they turned to Unanet. The results? They were able to bring all their data – and people – into one place for greater efficiency, enhanced collaboration, and streamlined processes across the business. That's led to tangible improvements for a business that's seen a 20% rise in profitability since adopting Unanet.

Challenges

Before implementing Unanet, Wendel experienced several operational challenges:

- **Siloed systems:** Wendel's separate platforms for accounting, customer relationship management (CRM), and project management created inefficiencies and data inconsistencies.
- **Poor user adoption:** Many employees relied on their own methods for tracking contacts, opportunities, and projects. This led to low engagement with their existing systems.
- **Manual processes:** Teams were bogged down by administrative tasks, such as project handoff, invoicing, resource scheduling, and revenue projecting – delaying project progress.

According to Linda Thompson, Wendel's Controller, "We had so many systems running separately, it was difficult to get consistent, accurate and timely information. **We knew we needed everything in one place.**"

“

For our go/no-go decisions at Wendel, utilizing Unanet's data and client history has significantly improved our strategic approach.”

– Rebecca Przepiora,
Director of Marketing

The Solution

Wendel implemented Unanet's enterprise resource planning (ERP) and CRM solutions to centralize their data and improve operational efficiency. Key features included:

Fully connected ERP and CRM: By unifying their systems under Unanet, Wendel gained real-time insights into both project and financial data. "The seamless integration between ERP and CRM has **streamlined our workflows, enhanced data accuracy, and accelerated ROI** through more efficient time tracking and project management," said Rebecca Przepiora, Wendel's director of marketing. "We're finding more users embracing Unanet's features. It's a simple system to use and easy to adapt to our company's needs and structure."

Configurable workflows: Unanet's flexibility allowed Wendel to tailor the platform to their specific needs, making it easier to manage complex organizational structures and processes.

A new approach to analytics and reporting:

With Unanet, Wendel streamlined its reporting processes with well-informed, interactive analytical data, reducing the time needed to gather and analyze information.

User-friendly interface: The ease of use led to high engagement across the enterprise.

“Unanet gave us one platform for everything,” said Thompson. “We went from struggling with separate systems to having all of our data in one place. It’s been a huge improvement.”

- Linda Thompson
Controller

The Approach

Wendel took a phased approach to implementing Unanet, ensuring a smooth transition across departments. Their strategy included:

- ✓ **Collaborative implementation:** Teams from finance, project management, and marketing worked together to configure Unanet for their needs.
- ✓ **Leadership support:** With strong backing from Wendel's C-suite, employees were encouraged to adopt new processes, **leading to higher engagement and adoption.**
- ✓ **Power user group:** Wendel created a **dedicated user group** to provide training and support, ensuring that all employees had access to expert guidance.
- ✓ **Ongoing support from Unanet:** Unanet's customer support team worked closely with Wendel throughout the implementation, helping to migrate historical data and ensure a successful rollout.

The Impact

Since implementing Unanet, Wendel has seen significant improvements across their operations:

Better support for the firm's growth. Thompson noted that Wendel's net sales have increased by 41% since 2023. While there are many factors in play for Wendel's rapid growth, Unanet has helped support the firm significantly in multiple business areas as they've skyrocketed.

Higher profitability: Unanet has also been one of many factors impacting the firm's strong and enhanced performance. Along with the many other improvements the firm has made, they've also observed a noticeable increase in profits since adoption. **"Our profitability has increased by over 20% since implementing Unanet,"** said Thompson.

Increased CRM adoption: Engagement with Unanet CRM jumped to nearly 75%, providing **better visibility to client relationships, opportunities, and ongoing projects.** Unifying its CRM and ERP led to a huge boost in engagement across the enterprise.

Stronger client relationships: "Unanet improves managing client relationship by providing a centralized view of our client data, automating follow-ups, and offering connection details through reports," said Przepiora. "These features help with our **communication, project transparency, and proactive client engagement,** leading to stronger client satisfaction." Thompson also noted that leveraging Unanet's full solution made a major impact, adding, "When we linked CRM and ERP together, this ensured seamless management for our pursuits, projects, and financials – the entire project lifecycle."

BY THE NUMBERS

Wendel's improvements since implementing Unanet

41%

Increase in growth

20%

Increase in profitability

75%

Overall CRM adoption due to unified ERP and CRM solution

“ The difference in our efficiency since implementing Unanet has been incredible... our overall efficiency has increased by 20% since implementing Unanet, which has definitely had a positive impact on Wendel's increased financial performance.”

- Linda Thompson
Controller

Better pipeline visibility: The real-time access to high-quality data Unanet offers has proven to be invaluable for Wendel. “For our go/no-go decisions at Wendel, utilizing Unanet’s data and client history has significantly improved our strategic approach,” said Przepiora. **“The visibility into past performance and client interactions has enabled us to ask more targeted questions, leading to more definitive decisions.** This data-driven insight ensures we focus resources on the most promising opportunities, which in turn enhances our overall success rate.”

Enhanced operational efficiency: “Unanet has increased **accounting’s operational capacity by approximately 20%,”** said Thompson. “And I expect that number to climb.”

Improved reporting and analytics: Unanet’s integrated platform allowed for more accurate, real-time reporting, reducing the time needed for manual analysis. “I’ve **reduced reporting preparation and delivery by 20%,”** said Thompson. “That number should increase over the next year as we continue to build out our dashboards.”

An overall smoother, more effective proposal process. “Automating the proposal process with Unanet **streamlined our document creation, ensured consistency, and reduced errors,”** said Przepiora. “It allowed our proposal teams to focus on crafting higher-quality proposals in less time.” This new level of efficiency has paid off in better results, according to Przepiora. **“So far this year we’ve seen a 7% increase in our hit rate from 2023 to 2024.”**

Streamlined project management: Project teams now have access to the tools they need to manage budgets and timelines efficiently. Thompson observed a productivity spike for the firm’s project leaders. “We’ve also seen an increased efficiency with PMs being able to see data in real time

BY THE NUMBERS

Wendel’s improvements since implementing Unanet



20%

Increase in accounting’s operational capacity



20%

Increase in operational efficiency for PMs



20%

Reduction in time it takes to prepare and deliver reports

“*Having leadership support was critical. Everyone was on board from the start, which made the transition so much easier.*”

– Rebecca Przepiora,
Director of Marketing

reporting,” she said. “Personally, **I have reduced reporting preparation and delivery by approximately 20%** and giving that time back to PMs is a direct impact to our bottom line.”

Reduced administrative tasks: With Unanet, Wendel was able to automate many of their manual processes, freeing up time for higher-priority work.

Enhanced collaboration: The centralized system improved communication between departments, leading to faster decision-making and better outcomes.

Simply put: Unanet helped Wendel simplify and enhance almost all aspects of its business operations. “Unanet **consolidates all opportunities in a single view, allowing teams to easily track leads, proposals, and bids,**” said Przepiora. “This makes it easier to manage multiple opportunities at once and ensures no lead slips through the cracks. Also, with up to date data on opportunities we are able to use that information in our forecasting and reports. We’ve combined our sales information with our backlog to allocate our resources more accurately.”

“**Our teams are more engaged,** and we’re finally working with accurate data,” said Przepiora. “Unanet has made a huge difference in how we manage our business.”

Wendel’s story highlights the power of bringing everything together in one system, and how much easier business can be when a firm does so – with the right solution in place.



Wendel Companies is a privately held, multidisciplinary firm that offers services in architecture, engineering, construction management, and energy efficiency. Serving clients across various sectors, Wendel operates throughout the U.S. and handles both public and private projects.



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