The Cornerstones of AE Success

The critical business software components your architecture and engineering firm needs to lay the foundation for better business today & growth tomorrow.

Unanet™

Who's this eBook for & why you should read it?

If you're responsible for ensuring your architecture or engineering firm has the business tools to meet your goals, this eBook is for you.

In it, you'll learn what critical components are needed to build a solid foundation of business software—one that will enable your firm to overcome the unique challenges of our time so you can improve business today and be ready for growth tomorrow.

We live in unique times.

While there's no shortage of projects for architecture and engineering firms, you face unprecedented headwinds. Today, economic uncertainty is the new normal, with inflation putting pressure on margins.

You must compete for talent and adjust to evolving hybrid and work-from-home scenarios—all while building a cohesive culture with a workforce that increasingly spans generations.

In times like these, you need to ensure you have a solid foundation of business software to tip the balance in your favor and capture market share.

Why business as usual is no longer enough.

We work with architecture and engineering firms like yours daily and have discovered that they face common issues that hold them back from realizing their full potential.

Let's examine those obstacles and why it's critical to disrupt the status quo to overcome them.

We operate in silos.

Today it's typical for your project, business development, finance, and leadership teams to use different systems or squirrel away information on their PC, mobile, or in their heads. From failing to leverage existing client relationships to win new business to project delays and billing errors, these silos stifle productivity and limit growth.

In addition, this lack of collaboration makes it challenging to create a cohesive culture and share essential knowledge across your team.

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> A lack of timely, trusted, and universally accessible information about projects and clients was hampering important strategic dialogue between project managers, business developers, financial managers, and the leadership team.
>
> —
> **Engineering Manager, Above Group**

Our processes are slow, manual, and error-prone.

If your firm still uses email, spreadsheets, or paper to run parts of your business, you're not alone.

For many firms, core business processes like proposal creation, project initiation, time and expense management, and billing and invoicing are still totally or partly manual. And manual processes are notoriously error-prone, leading to a host of downstream operational issues—from out-of-date information in proposals to incorrect invoices.

This slows business and impacts client satisfaction, profits, and your ability to compete. Tedious, manual admin tasks also sap morale and are an inefficient way to use your expensive professional resources—not a great way to attract and retain talent.

> "
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> **As our firm grew, we were looking for ways to complete basic but time-consuming administrative tasks more efficiently. We wanted access to live data to manage our business in real time.**
>
> **–**
> **Director of Finance, ISG**

We don't have real-time insights and data that we trust.

Do you or people on your team feel like they're flying blind? Making decisions based more on intuition rather than hard data?

This is a common issue across business functions within AE firms. It's tough to decide which projects to pursue, how to allocate key project staff, whom to hire next, or anything in between when your team must wait days for someone to compile a report.

Then when the data does arrive, it's often out of date or suspect in some way.

> " We had limited trust in the numbers, both inside and outside the accounting department. Reports were met with skepticism because people didn't believe in the data on which the reports were based.
>
> — **CFO, NewFields**

Getting to the root of the problem.

So, why are so many AE firms experiencing the challenges we've just described?

Well, the root causes are myriad. While your firm may not experience all of these, we're sure there are a few here that you identify with.

Clunky, old legacy software that's past its prime.

These systems lack the capabilities modern AE firms need to compete and are so hard to use that people in many teams won't adopt them.

Holes in the IT landscape.

Some firms don't have software for all business areas, leaving holes in the IT landscape filled with manual processes.

Systems that don't talk to each other.

This prevents vital data from getting where it needs to go. People in finance or IT often act as the 'human glue,' stitching together reports from different systems.

Business software that's too generic.

Often firms use software that's not tailored for AE and doesn't do what they need even after extensive configuration.

Analytics tools that aren't business-friendly.

Even if your firm has excellent real-time data, it's for naught if people across your firm don't have intuitive reports and dashboards that make it easy to understand what's happening.

A lack of data guardrails and business controls.

When you don't have a way of ensuring that your data is correct as it's captured and flows through your firm, the old 'garbage in, garbage out' adage rings true.
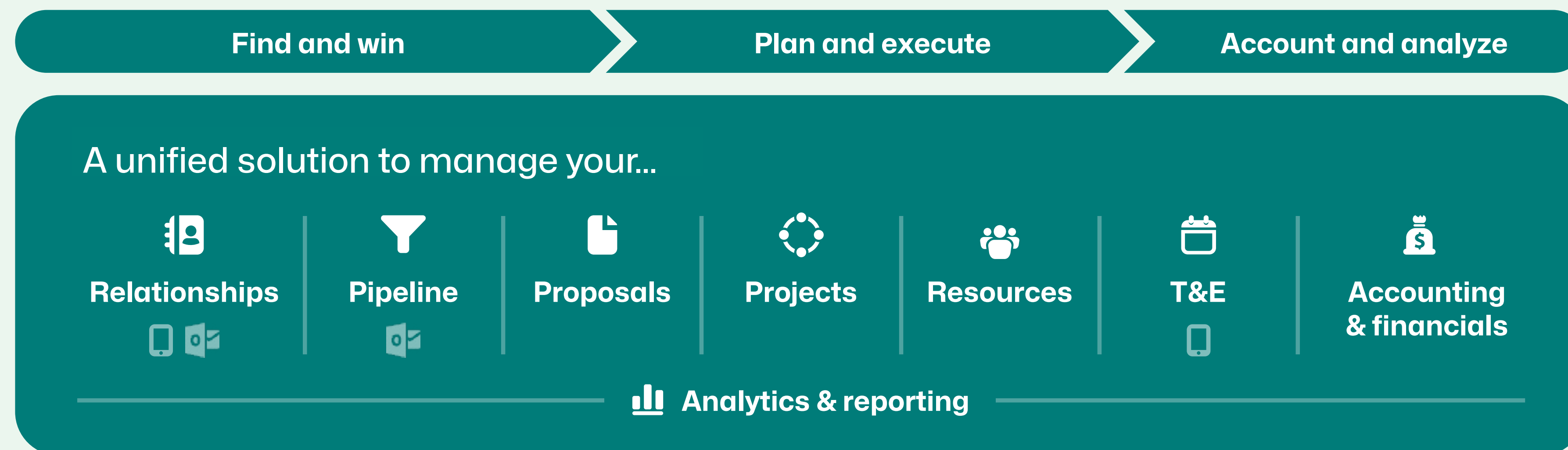
Tooling up for success today and tomorrow

Now that we've identified what's holding many AE firms back, let's talk about the cornerstone components you need to overcome these challenges and build the foundation for better business today and future growth.

A unified solution that spans your business.

Look for a modern, unified solution that enables you to manage the core aspects of your business—one that breaks down operational silos and brings your project, finance, and business development people together as one highly productive team.

Do this, and information once tucked away in someone's head or on their PC is now shared across the team—making your operations more efficient, aiding knowledge sharing, and helping you build a culture of collaboration.

Find and win	Plan and execute	Account and analyze

A unified solution to manage your...

Relationships	Pipeline	Proposals	Projects	Resources	T&E	Accounting & financials

Analytics & reporting

Why a unified solution matters.

When all your core business functions are covered in one unified solution, people collaborate across your firm and work smarter and faster. While that is great news in itself, when data flows seamlessly across your firm, you'll see that the whole is greater than the sum of the parts.

Here are just a few benefits of a unified solution.

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Give everyone intel to find and win the right projects.

When anyone can see the relationships between people in your firm and your clients, the strength of your resources, and metrics from past projects, they can make better decisions on which projects to pursue and improve your win rates.

Build winning proposals.

Imagine how much more convincing your proposals could be if your team had easy access to past project data and accurate, up-to-date info on your professional staff.

Initiate projects faster.

What if your team could automate the process with one click instead of manually typing in pipeline data to set up a new project? This saves time and avoids errors that can creep in when data is manually moved from one system to another.

Modern, mobile-ready software that's easy for everyone to use.

Today, your team expects modern tech that makes them productive wherever they work. Antiquated legacy software or piecemeal solutions just don't make the grade.
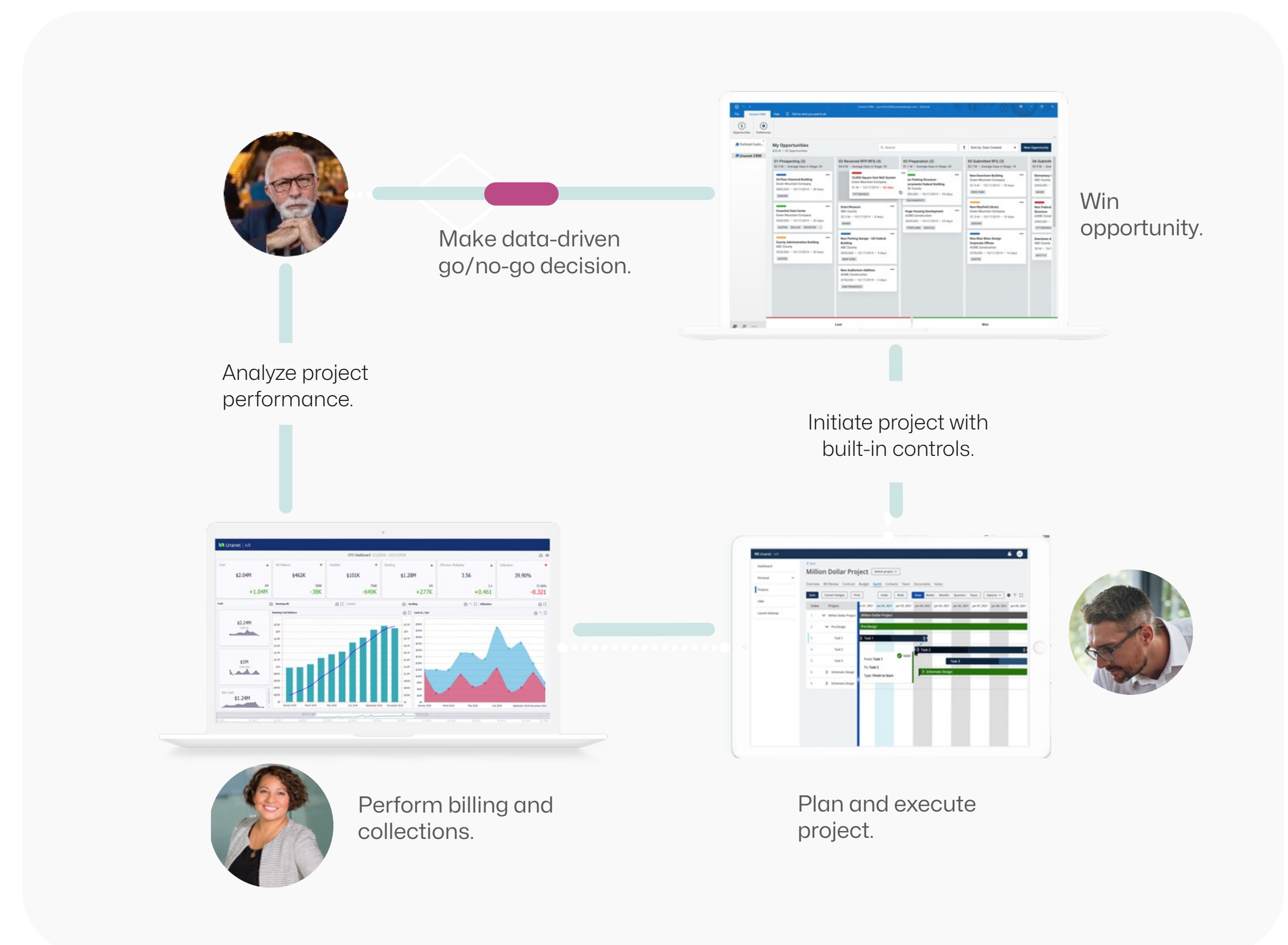
So, it is critical to give them business software that's super easy to use, mobile-ready, and integrated with systems they already use, like Microsoft Outlook.

A solution built specifically for AE firms.

Instead of deploying generic business software, look for a solution built from the ground up for AE firms like yours. That way, your team can be more productive with less software and get value from day one— without endless, expensive IT projects.

The software you choose should be packed with pre-built dashboards and reports, automated workflows, and business controls tailored to how your firm works. And all those features should be easy to tweak.

Make data-driven go/no-go decision.

Win opportunity.

Analyze project performance.

Initiate project with built-in controls.

Perform billing and collections.

Plan and execute project.

End-to-end process automation.

With pressure on margins and stiff competition, it's essential that your firm moves faster and becomes more agile. The software you invest in should be able to automate and streamline all aspects of your business—from tasks like initiating or transferring projects from one PM to another to automating core business processes like billing and collections, AP approvals and payments, and many more.

Look for a solution where your team can easily tweak the automations provided or even create their own. And it's critical that you choose software that easily connects to your existing HRIS, payroll, digital asset management, or other apps for true end-to-end automation.

Top candidates for automation

- Proposal data collection

- Billing and collections

- Accounts payable approvals and payments

- Project initiation from an opportunity

- Employee onboarding and terminations

Trustworthy, real-time insights and data.

To make the best decisions and reduce costly operational errors, your data must be current and of the highest quality. So, you'll need a solution packed with data stewardship features, like required fields and address validation, that ensure your data is correct as it's created and stays that way as it flows through your firm. You'll also need built-in business controls and logic like ... to keep your data and processes honest.

You'll want to equip your team with pre-built, interactive dashboards and reports so they can easily see what's going on in their part of the business without the hassle of building things from scratch or waiting for a report from finance or IT.

Seamless integration with your tech stack.

Even if you deploy a unified solution that spans your core business functions, that software will still need to talk to other systems in your tech stack, like HRIS, payroll, digital asset management, and marketing automation. So, look for a solution that makes that process easy and seamless.

You'll want a modern solution that offers pre-built connectors to many of the common systems AE firms use and one that provides APIs and webhooks so you can build custom integrations if needed.
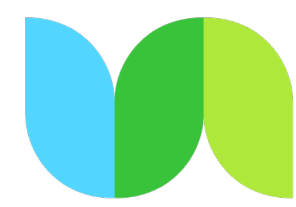
A partner or a vendor?

The software that forms the business foundation of your firm is critical infrastructure, so you need to be super careful as to whom you choose to supply and support it. You need to find a company committed to working with you as a partner and not just a software vendor—one with a solid track record of innovation and success with firms like yours.

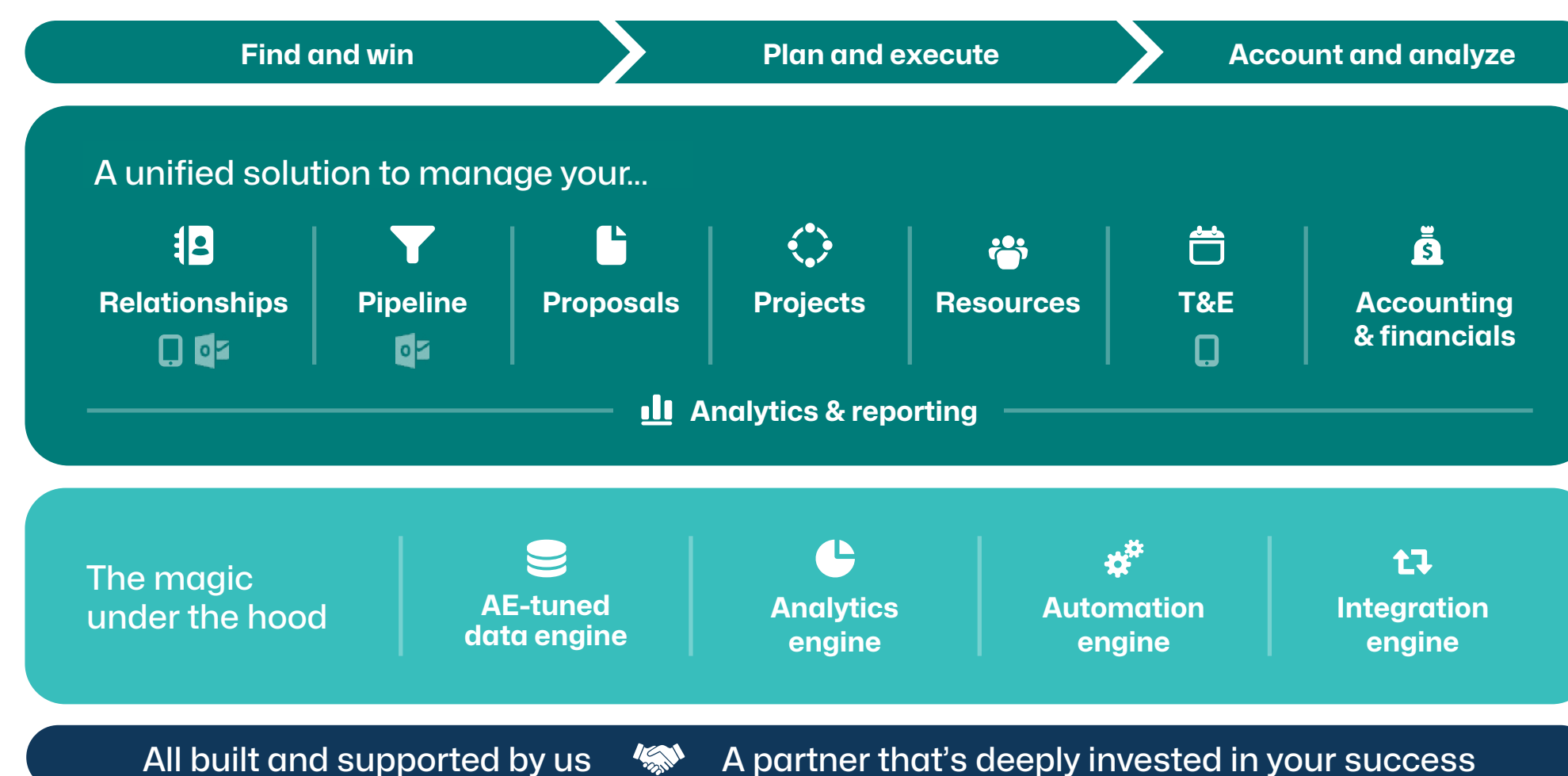Is your prospective partner an expert in both software and the A&E industry? How's their support? Is it highly rated and US-based? Do they provide flexible ways to learn about their products and opportunities to collaborate with peers? Do they listen and act on your feedback?

At the end of the day, you're entering a long-term relationship, so it's critical that you're comfortable with the answers to these questions and more.

Build your business software foundation with Unanet.

Find and win → Plan and execute → Account and analyze

A unified solution to manage your...

| Relationships | Pipeline | Proposals | Projects | Resources | T&E | Accounting & financials |

Analytics & reporting

The magic under the hood | AE-tuned data engine | Analytics engine | Automation engine | Integration engine

All built and supported by us — A partner that's deeply invested in your success

We hope we've given you some great tips on what to look for in your business software foundation.

Unanet provides a unified ERP and CRM solution that's modern, mobile-ready and easy to use. Built from the ground up for architectureal and engineering firms, it includes everything you need to find and win business, plan and execute projects, and do the accounting and analytics—all while working seamlessly with the tech you already use.

Our suite breaks down silos, speeds up processes, and provides trusted real-time insights and data, so your project, finance, and business development people can work together as one highly productive team.

A partner who's deeply invested in your success.

Although we're very proud of our software, we think what sets us apart the most is who we are.

Relationships are in our DNA, and we go the extra mile to ensure your firm succeeds with our software at every step of our partnership.

We hire industry experts and great listeners across our sales,

implementation, customer success, and US-based support teams—who always keep your needs front and center.

We offer first-class online and in-person education opportunities and many ways to network and ensure your voice is heard, including our unique Champions conference.

1850+

AE firms partner with Unanet to drive better business today and growth tomorrow.

98%

Our customer support satisfaction rating.

20+

The number of years we've been in business.

NewFields finds greener pastures with Unanet.

NewFields is an international environmental, engineering, and construction management consulting firm with more than 350 employees.

They turned to Unanet to help them overcome challenges caused by their antiquated ERP system, including:

- Slow, manual, error-prone invoicing processes were Impeding cash flow & wasting resources.

- Their legacy system's clunky UX caused low adoption by project teams, stifling collaboration and productivity.

- A lack of trust in the numbers was causing gut-level versus data-driven decision-making.

- Reporting logjams stressed out finance teams and slowed down business.

- A lack of insight into job costs was leaving money on the table.

NewFields
Perspective. Vision. Solutions.

IMPACT

After implementing Unanet's solution, NewFields saw immediate positive impacts on their business.

Leaner, faster, automated billing & collections

Our accounting people and project managers were sending thousands of emails back and forth each month to try to get invoices right.

Imagine what that costs—and how much time we're saving now that's all automated with Unanet.

Operating as a cohesive team on one modern platform

By moving to Unanet, people got the message that yes, we are serious about giving them the tools they need to work smarter, not longer.

Unanet has become a cultural rallying point and catalyst for collaboration across the business.

Trusted insights and data at their fingertips

We saw a more than **100% increase in quarterly profit** at one of our offices.

And I can say with certainty that was a direct result of people trusting, then acting upon, the data and insights they are now getting from Unanet on job costing, break-even points, and other project KPIs.

After an extensive search, NewFields selected Unanet because of the company's

- Best-in-class service and support
- Deep industry expertise
- Robust automation capabilities
- Seamless integration with NewFields's tech stack

NewFields

Why they chose Unanet

Additional resources

Want to learn more about how our business management suite can enable you to lay the foundation for better business today and growth tomorrow?

Check out these resources. →

NewFields Case Study

Above Group Case Study

ISG Case Study

UMC Case Study

Hixson Case Study

Solution brief for your executive team

Next steps

We're excited that you're considering joining the Unanet family.

We'd love to learn more about your needs. Please get in touch with us at unanet.com to set up an initial consultation or contact your account executive to continue the conversation.

→ **Unlock the potential of a happier, more productive team today.**

Unanet

Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for Government Contractors, AEC, and Professional Services. More than 3,600 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.