

SUCCESS STORY

M S Benbow Uses Newfound Data Insight to Elevate Processes, Decision-Making, & Planning



CHALLENGES

Weary of the waste, inefficiency, and lost value that resulted from relying on a patchwork of disparate software — including Excel, Sage50, BillQuick, Tableau, and Salesforce — M S Benbow & Associates (MSB) decided they needed an integrated, project-based ERP solution to become more data-intelligent, resource-efficient, innovative and competitive.

Establishment of a stand-alone project management department within MSB in 2017 exposed some of the firm's biggest ERP challenges:

- A reliance on multiple disparate systems required time-consuming, often redundant data entry and transfer.
- Data bottlenecks were preventing the free and timely flow of actionable data to inform project-specific and firm-wide strategic, forward-looking decision-making, while also limiting cross-departmental collaboration.
- The lack of a single, simple environment in which to view and analyze project data in real-time also hampered decision-making.
- Inefficiencies surrounding critical processes such as opportunity tracking, project startup, client invoicing and expense reporting.

ABOUT M S BENBOW & ASSOCIATES

Multi-discipline, integrated engineering consultancy serving refineries, airports, convention centers, campuses and large public venues throughout the U.S. for over 40 years.

- 112 employees across offices in Metairie (HQ) and Mandeville, La., and Houston and Dallas, Texas.
- Professional registrations in over 30 states.
- Expertise in electrical power systems, instrumentation & controls, telecommunications & technology, and drafting & design, with end-to-end project management services.

“Unanet A/E has been a true catalyst to collaboration around the right issues within and across departments. It's giving us insight into data that we're using to get at the core of real business issues, and has gotten us to the point where we are incorporating more forward-looking data for planning.”

—Jennifer Edwards, CPA, Controller, M S Benbow

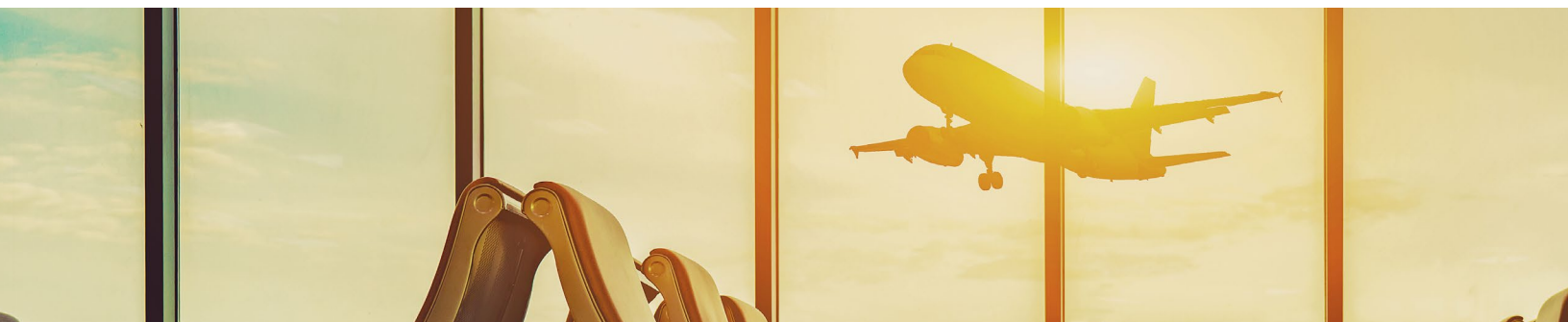
THE UNANET SOLUTION FOR M S BENBOW & ASSOCIATES

MSB is using the Unanet A/E, powered by Clearview, cloud-based ERP software platform, purpose-built for architecture and engineering firms. The firm is utilizing most of the modules available with Unanet A/E, including accounting modules (A/R, A/P, and General Accounting), the Marketing module, the Project Management module, Advanced Analytic Dashboards, the Analytic Dashboard Designer and Flows & Actions.

IMPACT

Since M S Benbow went live with Unanet A/E in July 2019, the firm has seen a 2% increase in gross profit that they attribute directly to various ERP-related improvements, including:

- Having a single source of truth across the enterprise for sounder, better-informed and swifter decision-making based on real-time data.
- A firm-wide wave of process improvements is boosting operational efficiency through automation, less redundancy and elimination of silos, freeing employees to focus more on strategically relevant and value-generating work. Tools within the software have enabled the firm to streamline processes like project startup and expense reporting. MSB reports a 66% reduction in time spent setting up projects, along with an 85% reduction in project-specific information requests (because information is now readily available in the system).
- Customizable dashboards have helped the firm to standardize metrics and reporting KPIs, providing a new level of actionable insight across the firm. MSB estimates saving more than \$25,000 annually utilizing dashboards instead of relying on weekly and monthly reports.
- A shorter time to cash. From the system, MSB can email invoices to clients directly, track collection correspondence and process payments. AR collections have improved by 18 days as a result.
- A customized “escalation” dashboard and analytics tools enable the firm to be more directed and effective with marketing, leads, estimates and other CRM functions. “Insight is just jumping off the page for us, with an internal CRM to tell us exactly what is important,” says Johnathan Hills, an MSB project manager.
- More forward-looking resource planning, with analytics tools that enable the firm to use data to more accurately estimate projects, track project profitability, compare actuals to budget, and efficiently manage accounting and finance functions.



“The dashboards have been a game-changer. They’re putting real-time insight in the hands of the people who need it to make decisions. The dashboard we created for project escalation has been worth its weight in gold.”

—Johnathan Hills, PMP, PMI-PBA, CPBI, LSSGB, Project Manager, M S Benbow

KEYS TO SUCCESS

1. Commit to doing the upfront work. Evaluate multiple solutions (MSB chose Unanet A/E from a shortlist of three software platforms), validate data, map your processes and elicit feedback from those at the point of the decision in advance.
2. Assemble and empower an implementation team. For its ERP initiative, MSB formed a dedicated, cross-departmental team headed by one of its project managers.
3. Thoughtfully and methodically manage change around the ERP initiative. Communicate and communicate some more, ensuring people understand the “why” behind the initiative — why you chose the software you did and how it will improve employees’ workflow.
4. Encourage self-sufficiency as part of the training process. Motivate people to explore the software and learn how to use tools/functionalities, and also let them know support resources are readily accessible should they need them.
5. Measure and document. Establish KPIs to gauge the impact of the ERP. Document why specific dashboards were created.



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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