

Going All-In With Digital Integration Propels the Above Group to New Sales Heights

CASE STUDY

As Above Group gained clients, opportunities, projects and all the data that comes with them, the clearer it became to the design and engineering consulting firm's leadership team that for the business to keep maturing and fulfilling its ambitious goals, it urgently needed to modernize its systems for managing people, information, projects and relationships.

"We have aggressive growth goals. We have big plans," explained Nicholas Kugler, PE, Above Group's Owner and CEO. "So we needed to get a handle on our data, because we really believe there's immense value in that."

After six years of steady business growth, Above Group was outgrowing their methods with a lack of structured, integrated systems for running critical aspects of the business. This left data — and the valuable insight it could yield — scattered, obscured and difficult for people to access, causing a variety of issues across the company:

- **Critical decisions were being made without a full data picture.** Members of the leadership team and project managers lacked historical, accurate data to make fully informed decisions about new business pursuits, active projects, finances and overall strategy.
- **Multiple departments were wasting valuable time on duplicative manual tasks.** Accountants, project managers, business developers and marketing team members were entering the same data in separate, unconnected systems.



ABOUT THE ABOVE GROUP

Founded in 2014, the Above Group (www.abovegroupinc.com) provides design, engineering and consulting services for aerospace, industrial manufacturing, science & technology, healthcare and government projects, including extensive project work for the U.S. Department of Veterans Affairs. It's a veteran-owned and operated small business headquartered in Melbourne, on Florida's Space Coast, with five offices in four states.

- **Data siloes were stifling collaboration between departments.** 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.
- **Billing process inefficiencies were slowing revenue recognition.** The accounting processes vital to maintaining steady cash flow were bogged down by time-intensive email exchanges to get invoices right.
- **The firm was leaving new business on the table because targeting was an inexact science.** Evaluating new business pursuits was based too little on data and too much on gut instinct.

The issues had become obvious. Now the leadership team had to determine how best to fix them. Should they take a piecemeal approach by seeking a new enterprise resource planning (ERP) system or a more modern customer relationship management (CRM) solution?

Kugler was clear about the firm's goal: "Finding a single ecosystem that integrates ERP and CRM made sense for a growing firm like ours. What you put into it is really going to come out the other side to your benefit." So instead of one or the other, Above Group ultimately chose to pursue a fully integrated solution. And now, with the firm on track for a record-breaking sales year just months after implementing an integrated Unanet digital ecosystem built around Unanet ERP AE and Unanet CRM, that decision is paying huge dividends for the business, in serving its mission, its employees, and its clients.



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— John Raine, Engineering Manager, Above Group

THE INTEGRATED SOLUTION FOR ABOVE GROUP

After carefully considering the options, decision-makers at Above Group opted to go all-in with a solution that integrates ERP and CRM, having concluded that their fast-maturing, growth-focused firm could really benefit from a single digital ecosystem that simplifies the firm's IT infrastructure while providing the sophisticated tools it needs to manage projects, relationships and the business as a whole.

Unanet quickly emerged as the clear choice for Kugler and team for several reasons:

- **A single, integrated solution would give the firm a fully realized digital ecosystem.** Because Unanet's ERP and CRM systems work seamlessly together, Above Group could avoid the time and expense involved in developing connectors or integrations between the two systems. Information entered into the system once shows up in multiple places in both the ERP and CRM with no additional steps required.
- **With Unanet ERP AE, the firm would finally have a single, trusted firm-wide system for connecting and automating the project lifecycle,** with powerful analytics, highly visual dashboard-based reporting and a best-in-class user experience.
- Unanet CRM would complement the new ERP system, giving the firm's business developers and marketers **a powerful, mobile-enabled platform for cultivating, nurturing, managing and viewing every aspect of their prospect and customer relationships.**
- **One provider would mean a smoother, faster implementation experience.** Unanet's support team included both ERP and CRM experts with extensive experience guiding architecture, engineering and construction firms through the process of implementing the two systems at once. Instead of bouncing between multiple vendors in search of information and answers, they could go directly to one knowledgeable and accessible source.



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— *Ashley Hartman, Marketing & Business Development Manager,
The Above Group*

IMPACT

For the Above Group, the whole — ERP + CRM — has proven to be greater than the sum of its parts, with results that vindicate the firm's decision to implement both solutions at once:

- 1. Winning more business thanks to stronger proposals and presentations. With 2022 SALES EXPECTED TO DOUBLE COMPARED TO THE PREVIOUS YEAR and A WIN RATE THAT HAS INCREASED TO A ROBUST 44%,** the firm's ability to generate superior proposals, quickly, has the firm competing for projects against much larger competitors — and winning. That's due in large part to the CRM and ERP systems providing business developers with fresh, relevant data from past pursuits, projects and proposals that they are using to inform proposals and presentations. "Things have changed under Unanet," said Ashley Hartman, Above Group's Marketing and Business Development Manager, "so that now we stand apart from our competitors. A lot of it has to do with information being readily available to make our proposals and presentations stronger."
- 2. Winning the right business, not just any business.** With the newfound ability to easily extract and analyze past pursuit and project data, and to calculate win probability, the firm has fine-tuned its pursuit and go/no-go strategy so it can zero in on the most desirable projects and clients. "We have achieved target market precision," said Hartman. "Instead of just going after general business, we're boiling it down to exactly which facilities in which states present us with the most opportunity, and we're dedicating our resources to the pursuits that are most winnable and desirable."
- 3. Turning PM touchpoints into BD opportunities.** With the ability to view details on the various people with whom the firm's project managers interact (key client contacts, including facility managers, program managers, civil engineers, etc.), Hartman said she and her team now can easily identify and target individuals who may be able to help them in new business pursuits.



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- 4. Less time spent hunting for information = more time spent on stuff that really matters.** The automation features within Unanet ERP AE and Unanet CRM are saving project managers, accounting and business developers countless hours of tedious, redundant data entry and information-retrieval. On the business development side, for example, not having to chase down data to include in proposal responses is **SAVING THE FIRM'S SENIOR MARKETING COORDINATOR 10 HOURS A WEEK** on average. "Best investment ever!" Hartman said, referring to Unanet CRM and its automations.
- 5. Streamlined work flow for better resource management and a better employee experience.** "It has been a gamechanger for us to be able to understand from a workload perspective what is coming, what our manpower needs will be based on what we have in the project pipeline, and how to ensure our staff and teams don't suffer from overload," said John Raine, the firm's Engineering Manager. "Unanet ERP AE and Unanet CRM are enabling us to look much further down the road than we ever have before."
- 6. Cash is flowing faster into the business.** Automations within Unanet ERP AE have **CUT BILLING APPROVAL TIME 50%**, which has translated directly into more consistent and predictable cash flow. "Centrally-located, automated billing and invoice processes have streamlined our finance operations and brought alignment throughout our organization," observed Ben Jones, Above Group's Director of Operations. "Unanet ERP AE automation quickly and efficiently produces focus in areas that need attention while also seamlessly handling processes behind the scenes to optimize time and workflow."

KEYS TO SUCCESS

Several factors have helped the Above Group realize a strong return on its investment in an integrated digital ecosystem, among them:

- **Going the extra mile for maximum efficiency.** After initially deciding to start with a new ERP, Above Group adjusted course upon learning of the tight integration between Unanet's best in class ERP and CRM offerings. Their investment in an integrated solution will help them move quickly out of the siloed world they sought to escape and solve their challenges in a systematic way.
- **Finding new ways to leverage data and institutional knowledge so the past informs the present and future of the firm.** With the ability to easily capture, tap into and share information and insight in real-time about business relationships, prior pursuits and past projects, the proposals a firm produces and the relationships it cultivates are bound to bear more fruit. In Above Group's case, having the right information at the right time is "really impactful. When you can give people exactly the information they're seeking, and answer their questions in the moment, that leaves a really good impression and conveys a sense of professionalism that's really important for a growing firm like ours when we're swimming in the same pond as the big fish," Hartman said.

- **Setting the bar higher.** In a market flush with new business opportunities for AEC firms, there is no reason to settle for just any new business or a win-rate that is merely “good enough.” Armed with the right ERP and CRM tools, the most desirable projects and clients are within reach, even for a smaller firm. Those tools have helped Above Group compete on equal footing with much larger firms.
- **Prioritizing the employee experience.** Sure, more wins, larger margins and better project outcomes are great. But those only happen if your workforce is engaged, fulfilled in their jobs and not consistently overworked. The software you choose should ultimately enable people to work smarter, not more, and help them to feel empowered in their jobs, with things like automation, dashboards, analytics and a mobile app at their fingertips. “You want to be sure your staff and teams don’t suffer from overload,” Raine said.

To learn more about Unanet and what a purpose built solution can do for your architecture, engineering or construction firm, contact us at unanet.com.

Where Information Means Insight

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