

How EnVision Consultants saved money and made billing easier with Unanet

Motivation to Find a New ERP Solution

EnVision Consultants prides itself on delivering simplified consulting and its ability to provide responsive, results-driven services to its clients. The start-up consulting firm is a multidisciplinary team with a focus on environmental, infrastructure, geotechnical, and ecology related services.

To continue providing the high level of support its clients had come to expect, EnVision needed a new enterprise resource planning (ERP) system to help them scale. The firm needed a solution that wasn't complicated to use and was custom-made to help it better serve its clients as it grew fast.

The Challenges

Before adopting Unanet, EnVision observed a pronounced need for an ERP that worked for its project managers. Three challenges stood out in particular:

- **The firm needed flexibility.** EnVision wanted an ERP the start-up could update and customize as needed. According to Director of Finance Adrian Lee, he had used other solutions at a previous firm but recognized the need for a comprehensive ERP solution capable of effectively supporting this firm's rapid growth trajectory. "The other solutions were too rigid and didn't meet the needs of a start-up," said Lee.
- **The lack of a comprehensive system led to inefficient workarounds.** Without an ERP system in place before Unanet, the firm tapped into multiple other disparate systems to get work done.
- **The firm was outpacing its lack of an ERP.** The firm's headcount had increased by eight times in a three-year period. It simply couldn't sustain those numbers with workarounds. As the company grew, it sought to empower its people with an easy-to-use ERP that filled numerous business needs.

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EnVision Consultants works collaboratively alongside project owners, contractors, design professionals and other stakeholders, providing design and construction support services that are tailored to the unique needs of each client and each project.

The Solution

A colleague from another company raved about Unanet to Lee, so he investigated it. After evaluating Unanet AE ERP, Lee and the rest of the team at EnVision saw its potential and made the choice to go with Unanet for these reasons:

- **A configurable dashboard allowing for tailored data management.** EnVision used Unanet's configurable, interactive dashboards to make information readily available. This provided real-time access to pivotal data, improving decision-making and negating the need for auxiliary third-party solutions.
- **It had capabilities that could grow alongside the firm.** Workarounds may work fine when a firm starts out, but Lee knew EnVision would require a consistent, reliable system as it grew. Unanet's capabilities and purpose-built architecture could support EnVision as it scaled upward.
- **It provided a singular solution.** One of the major advantages of Unanet was that it fulfilled so many needs for EnVision, the firm didn't need to implement multiple other software systems or programs alongside it. From an ERP standpoint, Unanet provided the much-needed flexibility and customization that streamlined operations and enhanced efficiency.

Choosing Unanet AE ERP then led EnVision into the implementation process, which went off without a hitch.

The Approach

Lee wanted to find an ERP system that would support the company as it scaled. The organization as a whole found itself more than ready to start using Unanet, which it did using the following process:

- **Evaluate the processes that needed an overhaul.** EnVision looked at its business processes Unanet could assist with – such as processing vendor invoices – and began to transition these processes and data to its new solution.
- **Tap into Unanet's support system.** EnVision worked with Unanet's team during the sales and onboarding process. "There is training involved, but the learning curve isn't bad," said Lee. After a smooth implementation, EnVision observed substantial adoption among its project managers and directors, who embraced the software.
- **Ask questions when they needed additional help.** When the firm needed assistance, it was able to easily find it. "When we reach out to Unanet, the response time is great," said Lee. "We always get the help we need within a couple hours."



Being able to see data in real-time is huge. At my previous firm, our reports always lagged behind what was actually happening with our projects. Now, with Unanet, our project managers are running on up-to-the-minute info. When something changes, you see that right away.

– Adrian Lee,
Director of Finance,
EnVision Consultants

The Impact

EnVision observed noticeable impacts to its business that helped the firm save both time and money while helping it manage its cash flow:

- **Unanet's AP approvals feature saved EnVision approximately \$6,000.** By leveraging Unanet's accounts payable (AP) approvals feature, EnVision discarded the need for an external application, resulting in an annual cost saving of roughly \$6,000. "We were getting many vendor invoices in the system, so we were looking at another third-party to implement AP approvals. As we were looking, Unanet added its AP approvals feature. It was perfect timing for us. The vendor wanted to charge us \$3 an invoice. So having that as a part of Unanet, at no cost to us, has been a difference-maker and a money saver."
- **A better billing process shortened the time it takes to bill clients.** EnVision gained more control over their cash flow and improved their billing process through AR Automation. By deploying Unanet's AR Automation, EnVision experienced quicker invoicing, making more cash available to the firm faster. "Cash flow is very important to us, so we try to bill quickly," said Lee. "Our timeline now is three to five days – sometimes we even get it out the same day."
- **Real-time access to data empowered project managers.** Unanet's easy-to-use, easy-to-read analytics and reporting platform is a project manager's dream come true. "It's all at my fingertips," said Lee, referring to project data. "Project managers can go in and see transactions. It's quite intuitive. Having them be able to access all the data easily has been fantastic."

EnVision looks to continue growing, and with Unanet, it has the ERP tools in place to support that. The firm can empower its managers with the information they need to successfully lead projects while making informed, data-driven decisions.



Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for government contractors, architecture, engineering, construction, and professional services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, maintain regulatory compliance, and accelerate business growth. All backed by a people-centered team invested in the success of your projects, people, and financials. For more information, visit www.unanet.com.