

# Need for Efficiency fuels search for a new ERP system

*“When you’re a professional services firm and a government contractor,” says Brian Bartholomew, CP, APMP, Vice President of Operations at AGEISS, “your projects are everything.”*

But as much as AGEISS was depending on its legacy enterprise resource planning (ERP) system to help it deliver positive, profitable project outcomes, the ill-fitting, cumbersome system wasn't up to the task. Instead of project managers embracing the system because it made life easier for them, they avoided it because it made their jobs more difficult. Technology that ultimately should support growth was instead holding AGEISS back. So when the firm's contract with its ERP provider came up for review, firm leaders jumped at the chance to shed that system in favor of a streamlined, feature-rich ERP solution built for project-based GovCon businesses. It proved to be exactly the right move at the right time.

## The Challenge

In his role overseeing business development, resource planning, IT, and contracts at AGEISS, Bartholomew saw first-hand how the aging ERP system was handicapping the firm in key areas:

**Data was difficult to access, incomplete and often outdated, making it difficult to track project status in a timely way.** PMs and firm leaders were forced to wait until month's end for critical project data, and even that wasn't always trustworthy. Ad hoc reports? Forget it. “We couldn't get the data we wanted out of the system,” he says.

As a result, **PMs and firm leaders were forced to make decisions – about specific projects as well as the strategic direction of the company – based on incomplete, outdated and sometimes inaccurate data.**

**People felt like the legacy ERP vendor was nickel-and-diming them and holding their data hostage.** Numerous times AGEISS had to pay the vendor for software customizations just to gain access to reports with its own data. “Every time we needed to get certain data out of the system, they'd say, ‘Give us \$5,000 or \$10,000 to do that for you,’” Bartholomew recounts. “They acted like it was their data.”

**Project managers avoided using the ERP system.** Too many cumbersome processes, too much manual data entry and too few GovCon-specific capabilities frustrated PMs to the point where they refused to use the ERP.

## AGEISS

Founded in 1988, AGEISS provides professional support services to federal and state government agencies, with a focus on energy & sustainability, environmental services, facility operation management, and professional and engineering services. Based in Colorado, its staff of about 115 people are spread across 15 states. AGEISS is ISO 9001:2015 certified. .

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## The Solution

With a “really bad taste” lingering from their experience with the legacy ERP system and its provider, firm leaders set out to find a more modern, GovCon-tailored ERP from a company that would treat the firm as a true long-term partner, not just a cash dispenser. It test-drove several options and Unanet was the only one that “knocked it out of the park.” The decision to go with Unanet ERP GovCon came down to several factors:

- **It’s a true, integrated project management AND financials solution designed from the ground, up, for GovCons**, not a financials software product with awkward, bolt-on project management capabilities.
- **It puts real-time project data at peoples’ fingertips**, in easy-to-extract, understandable, simple-to-customize dashboard formats.
- **A robust set of out-of-the-box features gives the firm a one-stop shop for project controls, resource planning and accounting**. And those features track directly to GovCon processes.
- **Unanet’s resource planning capabilities were an ideal match for AGEISS’s matrix-based approach** to managing resources.
- **Unanet’s contract module gives the firm’s contract managers direct insight into projects and direct access to all documentation**, whether the firm is the prime contractor or a subcontractor on a project. The module also is versatile enough to support contracts involving AGEISS’s joint venture companies.

## The Approach

Bartholomew and his colleagues took a few simple but important steps to ensure the shift to Unanet ERP GovCon would go smoothly and deliver the expected results:

- **They committed to thorough due diligence**, evaluating three different ERP options before deciding Unanet was the best match not only from a software standpoint, but also as a tech partner. As part of the process, be sure to ask – and get clarity from the software provider – about the product roadmap for the ERP solution. Ultimately, you want a solution and provider that are going to grow with you.
- **They prioritized finding an ERP system designed specifically for project-based government contracting firms rather than settling for a suboptimal system**. Your ERP should track directly to the unique business processes, practices and requirements of a government contracting firm. When it does, people are more likely to use it, and as a result, your firm is more likely to see a fast return on its ERP investment.
- **They laid a strong foundation for a successful ERP transition** by ensuring their accounts were in a good state, setting down a clear vision for how they want the ERP system to work, and enlisting a third-party implementer. “This really helped our accounting staff shorten their learning curve,” says Bartholomew.

## The Impact

Bartholomew sums up the difference between Unanet ERP GovCon and its predecessor in one word: efficiency. And that efficiency is manifesting in measurable and sustainable improvements across the business:

- **Operating more intelligently.** Ready access to real-time data and ad hoc reports is resulting in better-informed, timelier decision-making by PMs and firm leaders. Armed with up-to-the-minute data and forecasts about resource utilization and needs, project status, joint venture tracking and more, people have all the information they need to make on-point decisions. As a result, project outcomes are improving for the firm and customers alike.
- **Vastly improved resource tracking and planning tools have improved hiring and utilization.** Challenged to get “really tight” with project resource planning versus actuals, resource managers at AEGISS have done exactly that thanks to Unanet’s intelligent, easy-to-use resource management capabilities, which track directly to the firm’s matrix-based approach. No more needlessly cutting staff due to guesswork. Now they can easily shift staff among projects based on real-time tracking of resource utilization.
- **The firm’s contract managers can do their jobs better because they’re directly dialed into projects.** Thanks to Unanet’s contract module, they have fresh information about project progress and milestones, whether the firm is the prime contractor, a subcontractor or the contract is associated with one of its joint venture businesses.
- **A big surge in buy-in from users.** Project managers have embraced Unanet ERP GovCon. They’re actively using it instead of actively avoiding it.
- **Gaining a true tech partner who listens to – and acts on – customer feedback.** AGEISS has taken full advantage of the multiple channels Unanet offers for customers to provide input and suggestions about potential new features, refinements, etc., including opportunities for customers to vote on specific new features. Soon after Bartholomew (and other customers) voted to add a PTO category to dashboards, Unanet did exactly that. In fact, many of the features embedded in Unanet ERP GovCon originated from customer feedback.
- **Project financial health is a breeze to track.** Tracking and forecasting unearned/unbilled project revenue took eight hours each month under the old ERP. Now it takes less than two minutes.
- **A much clearer cash flow picture.** Generating cash-on-hand reports, a process that took four hours with the legacy system, takes a matter seconds with Unanet ERP GovCon. And firm leaders actually trust and rely on those reports, unlike with the prior ERP.
- **Faster month-end billing for quicker revenue realization.** The intelligent, automated invoicing workflows embedded in Unanet ERP GovCon have cut month-end billing time 30%.
- **Sophisticated, simple-to-use reporting capabilities have elevated the firm’s audit readiness.** Unanet ERP GovCon has made it easy to track unbilled and unearned work, and to break down workshare split in contracts involving the company’s multiple joint ventures, simplifying compliance with SBA rules.

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*I’m very impressed with the way Unanet listens to end users and incorporates their suggestions into the system.”*

**Brian Bartholomew,**  
Vice President of Operations  
AGEISS

## AEGISS time savings with Unanet



**2 min per  
Month**

**Time to track and forecast unearned/unbilled project revenue down to 2 min/month vs. 8 hrs/month with old ERP**



**↓30%**

**Month-end billing time with Unanet down 30%**

Now, with Unanet ERP GovCon exceeding expectations, firm-wide frustrations caused by the old ERP are a distant memory. In fact, Bartholomew and AGEISS are such believers in what Unanet ERP GovCon can do for a business, they're actively recommending it to other GovCon firms, including the several companies they mentor through the U.S. Small Business Administration's Mentor-Protégé program. One of those companies, he notes, actually invested in Unanet ERP after witnessing it work for AGEISS.

To other firms considering an ERP upgrade, Bartholomew offers a bit of advice:

**Stop settling for a subpar ERP and, once you've found a solution that warrants a switch, "Just do it!" The pay-off can be fast – and substantial.**



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