

UNANET RESOURCE GUIDE

Making the Switch

(Spoiler Alert: It's easier than you think)

An executive guide to making the move from your legacy ERP provider



HOW TO USE THIS BOOK

As much time and money as a firm invests in finding and implementing the right software, what happens when circumstances change and that software or software provider, which seemed like such a good fit, suddenly isn't?

The good news is, if your architecture and engineering (AE) firm finds itself at such a crossroads, you've got options. There is a better way forward. And this book is designed to help decision-makers make the right ERP choice for the long-term health and stability of their business.

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Reasons to Consider Your ERP Options

Skeptical that shifting to another ERP will be worthwhile? We understand. But before you decide, consider the following about how your firm could benefit:

1

Uplevel your customer experience.

You deserve a partner that makes your success their own

2

Let your voice be heard.

You should have a direct feedback loop to refine and improve your ERP

3

Grow your ROI.

Partner with an experienced team to build on your investment to date

4

Gain more flexibility.

A purpose-built solution for the entire project lifecycle accessible from anywhere

5

Rid your firm of technical debt.

Your firm needs a modern, scalable solution to compete in the modern world

6

Begin a journey that focuses on you.

You deserve an ally whose product roadmap reinforces your success

**See next page
for a deeper look**



Reasons to Consider Your ERP Options

1 Uplevel your customer experience.

The quality of service and support that comes with an ERP solution is as important as the solution itself. Too many firms have been left out in the cold by poor or fading support. You deserve a partner that makes your success their own.

2 Let your voice be heard.

Have you had much say in product development over the years? At Unanet, we rely on a constant customer feedback loop to refine and improve our offerings. Many of the capabilities and features embedded in Unanet ERP AE trace back to customer suggestions and feedback.

3 Grow your ROI.

You can grow your existing ROI when you partner with an experienced team with the expertise to manage a seamless transition that maintains (or improves) your existing processes and customizations and builds on your investment to date.

- Bring your insights into real-time
- Gain a single solution your PMs will adopt
- Improve the processes that make you most profitable
- Enable collaboration across your business .

4 Gain more flexibility.

Your firm will win with a modern, purpose-built solution that addresses the entire project lifecycle with an open, flexible, platform with access from anywhere. A solution that pushes the pace of innovation with customer-focused investment.

5 Rid your firm of technical debt.

Legacy ERP products built on old platforms, with dated architecture and business logic can tether performance and scalability. Your firm deserves a modern, scalable solution to compete in the modern world where ease-of-use, ease-of-setup and user adoption is needed to drive actionable insights, better decision making, and accelerated business growth.

6 Begin a journey that focuses on you.

Does your current ERP's roadmap reflect your needs? In today's competitive landscape, you need more than just renamed or reimagined products. You need a partner whose product roadmap reinforces your success and redefines the pace of innovation, consistently reestablishing your competitive edge in the market.

There is a better way forward.

Why join the long list of AE firms that have decided it was in their best interests to switch from Deltek and other providers, to Unanet?



Customers are at the heart of all we do.

At Unanet, we've set ourselves apart for 30+ years by **treating every customer like a true partner.** This philosophy, paired with our modern solutions, empowers teams to unify front-office visions with back-office operations. The result is more meaningful insights, improved employee performance, and higher engagement, retention, and win rates.



Best in its class.

In independent rankings from software rating service G2, ERP users rate Unanet ERP AE ahead of all other project-based ERP solutions in a range of categories, including: the best for "meets requirements," "ease of admin," "ease of doing business with," "ease of setup, and "Likelihood to Recommend."



Pushing the pace of innovation.

Unanet gets you where you want to go, from projects to profitability, faster than you ever imagined. We never stop investing and innovating on behalf of our customers, with an aggressive release schedule that leaves our competitors in the dust.



Customer success comes first.

Our best-in-class customer success team is there for you, at implementation and every step of the way to ensure widespread adoption, usage, and the long-term success of your business.



An integrated, end-to-end platform.

Unanet simplifies the entire project lifecycle with an open, flexible, platform that offers pre-built integrations with a comprehensive suite of business applications.



Unparalleled industry expertise.

Unanet is recognized across the industries we serve for best-in-class, project-based solutions purpose-built for government contractors and AEC firms.



Simple, user-friendly design.

Whether it's our mobile app giving you project access from anywhere or our analytics offering insights into trends and data, our solutions lead the industry in ease-of-use.

Unanet is a major player in AE ERP.

Unanet is a major player in AE ERP. We have over 30 years experience in AE, and nearly 2,000 customers. Our customers choose us and stay with us for three simple reasons:

- 1 We have the best AE ERP product.
- 2 We put customers first at every step in their journey with us.
- 3 We have a dedicated migration path specifically designed for Deltek Vision customers including your customizations. We have hundreds of satisfied customers who have made the switch from Deltek.

30 years
experience

2,000
customers



Here's How We Make the Move to Unanet Easy

Expect a smooth experience moving to Unanet from Deltek, based on our implementation team's deep experience with Deltek-to-Unanet migrations.

When it comes to converting from Deltek, we speak the language and know the process inside and out. And we've tailored our proven implementation methodology specifically for Deltek Vision customers which includes:

- **Comprehensive discovery**, geared towards understanding your business outcomes and future state needs. Utilizing scripts tailored specifically to former Vision clients, we uncover **rapid insights** into your current state and a quick path to effective discovery and decisions.
- **Start Smart!** Unanet utilizes a **preconfigured** starting point for your database that includes industry standard best practices for system configuration.
- **Robust, accurate data conversion**. Due to the sizeable volume of Vision clients that Unanet has converted, we have deep knowledge and an associated **robust data migration process**. Full data conversion (including all history) is part of that process, along with streamlined and enhanced conversion scripts.
- **Analytics**. Our conversion analytics give us a full view into what matters. Predesigned (and customizable) **analytic dashboards and reports** provide meaningful insights into your business from day one.



Unanet Amplify for Deltek Vision:

Fast, seamless, and comprehensive implementations led by an experienced team focused on ensuring your success. A proven approach to implementation and direct, easy access to a dedicated team translates into quicker time to value and maximum return on your ERP investment.

Making the Move to Unanet Easy No Matter the Complexity

We follow a simple and proven 4-phase framework for a seamless transition from Deltek Vision regardless of requirements.



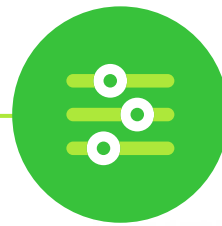
DISCOVERY

Strategic planning to ensure we **understand your goals and objectives.**



CONFIGURATION

Unanet AE is **pre-configured** for your processes and your data.



READINESS

Training and team checkpoints to **ensure you're ready for prime time**



GO LIVE

Fully supported go live processes and **onboarding** for your teams

UNANET UNIVERSITY SUPPORT & TRAINING

Successful Switches, Big Benefits

Six AE firms explain why they made the jump to Unanet, and how they're benefitting as a result.

Don't just take our word for it. Let your peers in the AE business who made the switch to Unanet explain why they chose us, and how they're benefitting from the move.

ISG

ISG IS BUILDING THE DREAM WITH A LIGHTNING-FAST ERP IMPLEMENTATION TO RUN LEANER AND SMARTER

ISG

ORGANIZATIONAL PROFILE

ISG is a multi-disciplinary design and engineering firm providing architecture, engineering, environmental and planning services across 11 offices throughout the Midwestern United States. Founded in Mankato, Minn., in 1973, ISG and its 350+ employee owners serve a diverse array of public and private clients via 12 business units.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

Widespread frustration across the organization with the highly inefficient and ill-fitting legacy ERP system and a lack of support from the system provider.

Challenges

The fast-growing firm needed to provide team leads with more visibility into overall project performance but its legacy ERP system made accessing information in real time difficult or impossible. Among the biggest frustrations ISG's teams had with the legacy ERP system:

- Too much time spent on manual data entry and migration due to a lack of integration between the ERP and other key systems.
- Inconsistent, unstructured billing schedules and processes that hampered cash flow and heightened the risk of billing errors.
- A lack of intuitive, visual reporting tools for a business that is heavily visually-oriented.

The ERP solution for ISG

Unanet ERP AE proved to be the "right fit" for ISG because of, among other things, the integrated tools it provides that enable the firm's accounting, project accounting and project management teams to share insight, collaborate in real time and generally work smarter.

ISG

IMPACT

Not only did ISG meet its aggressive 120-day timeframe for implementing Unanet A/E, the firm quickly began seeing benefits from its new ERP solution, including:

- A more consistent and predictable revenue stream thanks to streamlined billing.
- Massive time savings on payroll processing and employee management.
- Staying lean as the firm grows. While ISG's customer base and workforce have grown, the firm has maintained its HR headcount at 2.5, a direct result of using Unanet ERP AE.
- Information and insight flow unimpeded in real time among and within teams across the business.
- Better decisions, faster because execs have the data they need to make better-informed decisions.
- Building the dream. A fresh infusion of ERP capabilities and tools is driving digital transformation at ISG.



"Because of Unanet A/E's innovative platform, we now run faster and more nimbly," says ISG's Alec Pfeffer. "We're increasing revenues and providing an even better client experience without adding to back-office headcount."

ALEC PFEFFER

DIRECTOR OF FINANCE AND ACCOUNTING , ISG

NewFields

SWITCHING ERP SYSTEMS AND PROVIDERS HELPS NEWFIELDS FIND GREENER PASTURES



ORGANIZATIONAL PROFILE

NewFields is a global environmental, engineering and construction management consulting firm whose areas of specialization range from eco-engineering and renewable energy to mining design and construction management. Founded in 1995, the 350+-person firm is headquartered in Atlanta, Ga., and has 19 offices in the U.S., Canada, Mexico, the U.K. and Brazil.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

The legacy ERP system was working at cross purposes with the firm's central office, thwarting its ability to integrate and coordinate, while hampering the autonomy of the firm's field offices.

Challenges

Rather than breaking down data siloes and enabling the free flow of information and insight across the enterprise, as the best ERP systems are designed to do, the system on which NewFields has been relying:

- Made getting data from the firm's field offices, an essential function for the firm's central office, next to impossible. Answering a request to provide a list of projects performed for a certain oil and gas client, for example, could require someone to pull 10 different reports from 10 different field offices.
- Made it exceedingly difficult for field office employees to access data or run a report. They had to submit a request to the central office instead of simply accessing that information themselves, creating friction between the central office and field offices.

NewFields

The ERP solution for NewFields

After casting a wide net for a new ERP system and bringing a handful of candidates in for demos, the firm chose Unanet ERP AE for several reasons, chief among them the fact that it **integrates seamlessly with other go-to software**. Via the Unanet Connect integrations marketplace, NewFields can access pre-built application connectors to build out a digital ecosystem. Its first integration was with Concur, the firm's preferred travel and expense software.

IMPACT

Even before implementation, NewFields saw a difference with Unanet in several key respects:

- The Unanet team treated the NewFields team like a true partner.
- Unanet's expertise and experience in ERP for engineering firms is a valuable resource.



"Instead of creating friction, Unanet ERP AE has become a cultural rallying point within the firm. People see how data is going to be easier to find and they're fired up about that."

ERIC SALNAS, CPA
CHIEF FINANCIAL OFFICER, NEWFIELDS

M S Benbow & Associates

M S BENBOW USES NEWFOUND DATA INSIGHT TO ELEVATE PROCESSES, DECISION-MAKING & PLANNING



ORGANIZATIONAL PROFILE

M S Benbow & Associates is a multi-discipline, integrated engineering consultancy serving refineries, airports, convention centers, campuses and large public venues throughout the U.S. for over 40 years. It has 112 employees across offices in Metairie (HQ) and Mandeville, La., and Houston and Dallas, Texas.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

Too many disparate systems were causing a wide range of inefficiencies and project bottlenecks.

Challenges

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.

The ERP solution for M S Benbow

In implementing Unanet ERP AE, the firm is utilizing the solution's 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.

M S Benbow & Associates

IMPACT

Since M S Benbow went live with Unanet ERP AE, 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. MSB reports a 66% reduction in time spent setting up projects.
- 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. AR collections have improved by 18 days.
- A customized “escalation” dashboard and analytics tools enable the firm to be more directed and effective with marketing, leads, estimates and other CRM functions.
- More forward-looking resource planning.



MRCE

MRCE STREAMLINES BILLING AND IMPROVES PROJECT MANAGEMENT WITH UNANET



ORGANIZATIONAL PROFILE

Founded in 1910, Mueser Rutledge Consulting Engineers (MRCE) provides geotechnical and foundation engineering and design of underground and waterfront structures. It employs about 100 geotechnical and foundation engineers

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

An antiquated ERP system was exposed as unfit for a growing, modern business.

Challenges

Among the drawbacks of the legacy ERP system::

- Its inability to support electronic timesheets. Project managers had to submit project timesheets by hand and timesheet data entry alone took at least six hours a month.
- Errors. Project managers would often not properly code their tasks and accounting staff would need to track them down for clarification. All told, it was costing the firm hundreds of lost hours each year.

The ERP Solution for MRCE

It was the personal relationship and level of service Unanet could provide that led MRCE to choose the all-inclusive Unanet ERP AE solution. Unanet also came in and backed up all the company's data, some of which dated back more than 50 years. When it was time to make the switch, the process went off seamlessly.

MRCE

IMPACT

Implementing Unanet ERP AE has helped MRCE to:

- Modernize its outdated and time-consuming paper-based timesheet process, saving accounting staff hundreds of hours each year.
- Provide a more efficient system for project management, including project management dashboards and remote time sheet capability.
- Improve productivity tracking and management with the ability to create detailed productivity reports by project or individual.
- Enhance customer service for clients with the availability of detailed, project-level financial data.
- Do more with less, limiting the need to hire as the firm continues to expand.
- Improve cash flow by improving billing speed and facilitating a robust accounts receivable process.



TEN YEARS ON, HIXSON'S ERP SOLUTION KEEPS ON GIVING



ORGANIZATIONAL PROFILE

Hixson Architecture, Engineering and Interiors is a Cincinnati, Ohio-based firm that has built a national reputation in four areas of specialization: food + beverage, workplace, retail and science + technology.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

The ERP system on which it was relying was going to be sunset.

Challenges

Hixson was going to lose vendor support for its long-time ERP system, a reality that prompted the firm to seek a more modern ERP solution.

The ERP Solution for Hixson

After an exhaustive internal evaluation and external due diligence, the firm chose Unanet ERP AE because they were confident it would scale with them, with features like:

- Automated paperless invoicing.
- Analytics dashboards for real-time visibility into project status and resource deployment.
- Resource scheduling capabilities to manage people and their workloads more efficiently.
- Interactive Actions, wizard-style tools to help quickly and easily add projects, clients, etc., streamline workflows, and automate the flow of data across the firm.
- Extensive customizations that track to the firm's department-centric structure and workflows

Hixson

IMPACT

In Unanet ERP AE, Hixson found a long-term ERP solution that consistently delivers a range of benefits to the firm, including:

- Better hiring, growth and resource decision-making.
- A clearer, more accurate picture of projects in progress.
- Non-linear growth, the result of significant efficiency gains across the business. On the invoicing side alone, the firm is saving eight hours per week on average.
- More agile pipeline management.
- More consistent cash flow.
- Improved transparency with customers.



Gilmore & Associates

NEW INVOICE AND PAYMENT TOOLS PAY OFF BIG FOR GILMORE & ASSOCIATES



ORGANIZATIONAL PROFILE

Gilmore & Associates, Inc., is a century-old regional civil engineering and consulting firm that offers civil engineering, surveying, landscape architecture and environmental services, chiefly for municipal clients and projects. Founded in 1918, G&A's staff includes 175 employees across seven offices in eastern Pennsylvania and southern New Jersey.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

Glaring inefficiencies in the firm's handling of invoices and payments were hampering cash flow and the client experience.

Challenges

Among the inefficiencies and bottlenecks with which the firm was contending as a result of its legacy systems:

- A vast majority of clients (municipal agencies comprise roughly 80% of the G&A client base) were paying by mailed check, an inefficient process that extends time to cash.
- A lack of client access to convenient payment options and a central payment portal was detracting from the customer experience.
- G&A lacked visibility into client engagement with invoices once they were sent.
- The firm was inconsistent in following up with clients about their outstanding invoices because it lacked the ability to automatically send those reminders.

The ERP Solution for Gilmore & Associates

While Gilmore & Associates has been using Unanet ERP AE for more than 12 years, only in 2020 did it turn to Unanet Pay for invoice delivery and payment facilitation. Among the Unanet Pay features the firm is using are automated invoicing with email delivery, enhanced invoice tracking and management, and automated email reminders with embedded links to the Unanet payment facilitation portal, which is equipped with Stripe integration for ACH and credit card payments.

Gilmore & Associates

IMPACT

The features within Unanet Pay began paying dividends for Gilmore & Associates almost immediately, with such benefits as:

- Shorter DSO (days sales outstanding). DSO has declined by five days, largely as a result of the firm's expanded electronic payments capability, resulting in an estimated \$50,000 to \$60,000 increase in monthly receipts.
- Time savings for PMs and accounting. The time spent by accounting staff on check processing, check posting, and redundant data entry has been cut by 2+ hours each week.
- 100% visibility into invoice engagement. The G&A accounting department can view recipient opens and clicks in real time to track customer engagement with emailed invoices.
- Increased electronic invoice payments. The number of Gilmore & Associates clients paying invoices electronically via the Unanet Pay portal has at least doubled.
- Elevated customer experience. G&A clients appreciate the ease with which they can pay invoices, and the flexible payment options within the Unanet Pay portal.



Alvine Engineering

DRIVING INNOVATION WITH UNANET AE



ORGANIZATIONAL PROFILE

Founded in 1961, Alvine Engineering is a family-owned firm with 140 employees across four offices. Specializing in fire protection engineering, architectural lighting design, building commissioning services, technology systems design and life support systems engineering, it has active projects in 36 states.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION

The Deltek product the firm was using made accessing data in real time difficult, leading to diminished project outcomes for firm and client alike.

Challenges

After years relying on a Deltek ERP system, Alvine execs and project managers grew weary of the system's lack of visibility, integration and mobile accessibility.

The ERP Solution for Alvine Engineering

In choosing Unanet ERP AE, Alvine prioritized a solution that gives it real-time access to information across the business via multiple platforms and devices.

Alvine Engineering

IMPACT

Now that it's operating its business under a more modern, fully integrated ERP system, Alvine:

- Is meeting client and project needs more consistently, and closing projects out more efficiently.
- Has an “organizational nervous system” that is driving more predictable and profitable project outcomes.
- Has the flexibility it needs to collect data and information, then bring that data and information into its system and transform it into insight that execs and project managers are using to make better, more timely business decisions, and to satisfy clients.



“The software offers us the opportunity to enhance the experience of not only what trying to accomplish but in meeting the needs of our clients and design professionals alike.”

C-SUITE EXEC,
ALVINE ENGINEERING

User Ratings: More Proof of Unanet's Quality

In ratings published by G2 Reports and based on extensive input from the actual firms and people using project-based ERP software, Unanet is consistently recognized as a HIGH PERFORMER in dozens of categories, among them:

- Fastest implementation
- Highest user adoption
- Most implementable
- Easiest setup
- Best customer support
- Best relationship
- Easiest to use
- Best usability

What's especially gratifying for us is that these G2 ratings come directly from users. Not only does it tell us we're doing something right with the quality of the ERP solutions and support we offer to our customers, but it also increases our resolve to continue innovating, listening, and supporting them on their ERP journeys.



The next move is yours.

As a growing AE firm, you deserve better than the status quo. And for Deltek Vision customers, there's no better time to explore new horizons, with a superior ERP solution, from a provider, Unanet, whose service and support consistently rate second to none.

VISIT [UNANET.COM](https://unanet.com) TO LEARN MORE



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