HOW AE FIRMS ARE UNLOCKING GROWTH AND EFFICIENCY

Real-world case studies highlight architecture and engineering firms that elevated their business by modernizing their ERP systems.

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THERE IS A BETTER WAY

Can business software make a real, meaningful difference in your firm's project outcomes, client satisfaction, employee experience and bottom line?

The answer is a resounding "Yes!" And the proof is right here in these pages, where you'll find real-life case studies involving architecture, engineering and construction firms that decided to leave behind outdated legacy software and processes in favor of a modern, integrated, user-friendly enterprise resource planning sytem(ERP), and the wide range of benefits they're enjoying as a result.

As daunting a prospect as migrating to a new ERP system might seem, as these case studies make clear, the process can be quick, straightforward and most importantly, worthwhile in terms of return on investment. From selection to implementation and beyond, we've collected these recent stories and added in some best practices gathered directly from our AE customers to help decision-makers like you in your journey to finding software solutions that will be a true asset to your organization today and over the long term.

But don't just take our word for it. Read on to hear directly from your peers how rewarding their decision to switch has been — and could be for your own organization.

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UNDERSTANDING WHAT A SUPERIOR ERP SYSTEM CAN DO FOR YOUR FIRM

Choosing a critical piece of business software like an enterprise resource planning system is not a decision to take lightly. The more thorough your due diligence leading up the decision, the better the outcome likely will be. Here's a quick FAQ to help guide you in the evaluation process.

Q. How to know the right time to move away from a legacy ERP system (or basic spreadsheets)?

A. Oftentimes the inefficiencies and frustrations that come with sticking too long with a legacy system become too numerous and too undermining to the business to ignore. You'll know them when you see them. Perhaps revenue and win rates are sagging, without a clear reason why, or billing is painfully slow and error-prone, hampering cash flow. Maybe project managers, proposal-creation teams and others throughout the organization are spending way too much time hunting for Information. Perhaps decision-makers lack the timely insight they need to make the right calls for the business. Maybe project managers feel like they're flying blind. Or, maybe a disjointed, manual-intensive and glitchy user experience with the software is translating into low user adoption. If any of these ring true, it's time to find the modern, fully integrated solution your firm deserves and needs.

Q. How much should service and support weigh in choosing a software provider?

A. The quality of service and support that comes with a software solution is as important as the solution itself. The goal is to find software that can scale with your firm over the long run, one that's backed by a provider who treats your firm as a business ally. Look for a provider that will be there every step of the way, not one that disappears after the sale. To be confident you're getting the former rather than the latter, be sure to ask your peers across the industry for recommendations and interview prospective providers. With your investment, you should expect hands-on support, ready access to subject-matter experts, deep education and training resources, and a direct feedback loop in which the provider welcomes, listens to and acts upon customer input. Remember, it's only a "solution" if it helps a firm solve its business problems.

ERP SUCCESS STORIES

A modern, cloud-enabled and user-friendly enterprise resource planning (ERP) solution that's purpose-built for architecture, engineering and construction businesses can be a true difference-maker for a firm, its projects and its people, as we detail in the stories to follow.

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

ISG

ORGANIZATION PROFILE
ISG is a multi-disciplinary design and engineering firm with 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 software provider.

Challenges

Fast-growing ISG needed to provide team leads with more visibility into overall project performance but its legacy ERP system made accessing information in real time next to 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 in which people are heavily visually-oriented.

The ERP Solution for ISG

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

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Impact

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

- A more consistent and predictable revenue stream thanks to streamlined billing.

- Massive time savings on payroll processing and employee management.

- Non-linear growth. 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.

- Faster, better decision-making because execs have relevant data in front of them.

- A fresh infusion of ERP capabilities and tools is driving digital transformation.

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

ALEC PFEFFER, DIRECTOR OF FINANCE & ACCOUNTING
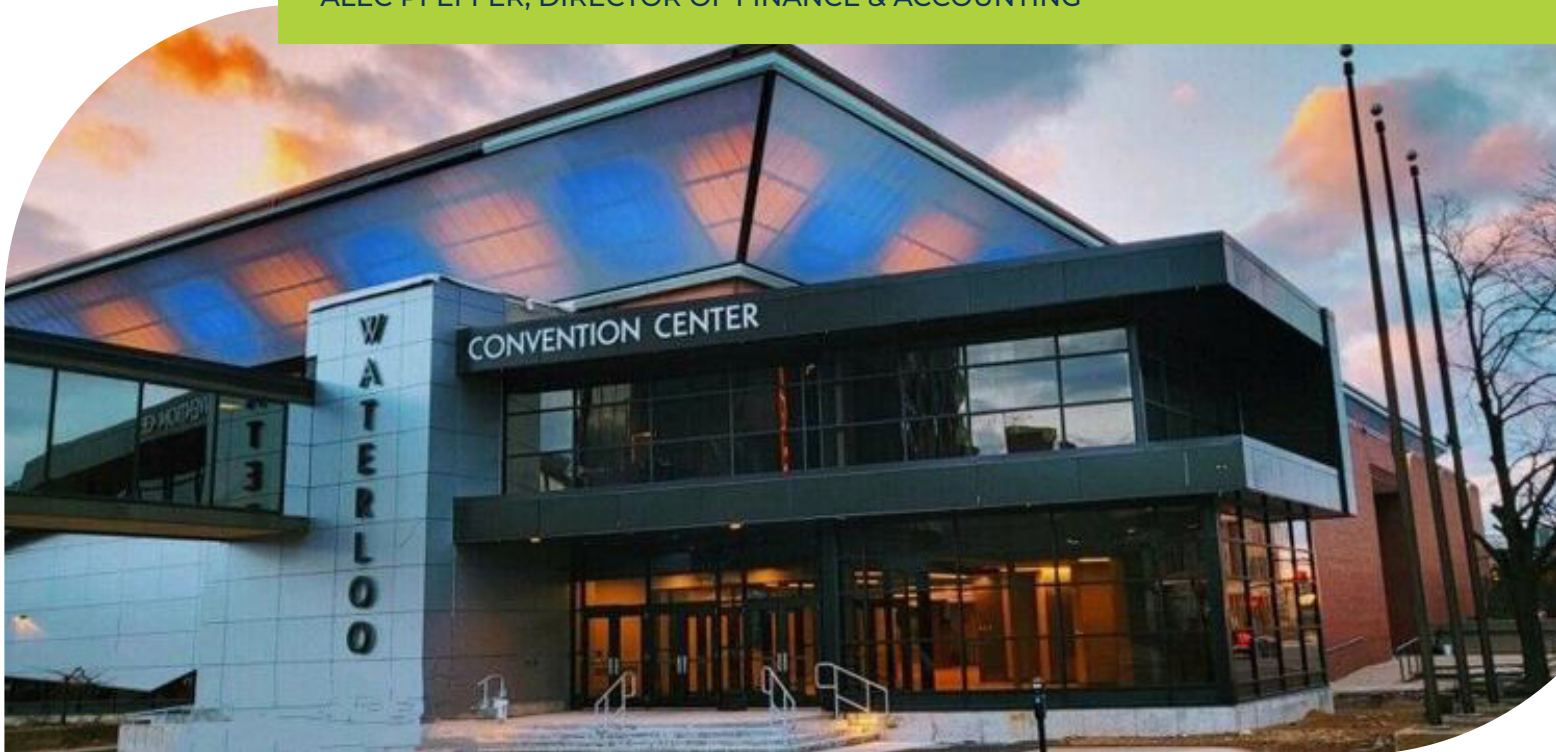
MUESER RUTLEDGE STREAMLINES BILLING AND IMPROVES PROJECT MANAGEMENT

MRCE

ORGANIZATION 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 engineers.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION
The firm's antiquated ERP system was exposed as unfit for a growing, modern business.

Challenges

Among the drawbacks of the legacy ERP system:

- An 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.

- Costly errors. Project managers often improperly coded their tasks, requiring accounting staff to track them down for clarification and costing the firm hundreds of lost hours annually.• Their existing module was unable to handle expenses.

The ERP Solution for MRCE

Unanet's personalized and knowledgeable support and service led MRCE to choose Unanet ERP AE. Unanet also 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.

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.

- Manage projects more efficiently using 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.

- Boost cash flow by improving billing speed and facilitating a robust accounts receivable process.

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"We've achieved return on our investment in Unanet ERP AE with efficiency improvements alone. We can get the detailed financial data we need quickly, right when we need it. Unanet ERP AE has also added visibility and accountability. Now, every project manager knows exactly how much money is in their project budget and how much they're spending, which is critical when you're working big projects with tight budgets."

JOSEPH COURTADE, DIRECTOR OF FINANCE & ADMINISTRATION

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SWITCHING ERP SYSTEMS AND PROVIDERS HELPS NEWFIELDS FIND GREENER PASTURES

NewFields
Perspective. Vision. Solutions.

ORGANIZATION 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., with 19 offices in the U.S., Canada, Mexico, the U.K. and Brazil.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION
The firm's legacy ERP system was working at cross purposes with the 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 legacy system on which NewFields was 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 client could require pulling 10 different reports from 10 different field offices.

- Made it exceedingly difficult for field office employees to access data and run a report. They had to submit a request to the central office instead of simply accessing that information themselves, creating friction between them and the central office..

The ERP Solution for NewFields

After bringing a handful of providers 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:

- Achieved stronger financial control of both their organization and projects.

- 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," says Eric Salnas, CPA, Chief Financial Officer at NewFields. "People see how data is going to be easier to find and they're fired up about that."

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

HIXSON
ARCHITECTURE ENGINEERING INTERIORS

ORGANIZATION PROFILE
Hixson Architecture, Engineering and Interiors is a Cincinnati, Ohio-based firm with 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, prompting 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 add projects, clients, etc., streamline workflows, and automate the flow of data quickly and easily across the firm.

- Extensive customizations that track to the firm's department-centric structure and workflows.

Impact

In Unanet ERP AE, Hixson found a long-term ERP solution that consistently delivers a range of benefits, 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.

- More agile pipeline management.

- More consistent cash flow.

- Improved transparency with customers.

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

GILMORE & ASSOCIATES, INC
ENGINEERING & CONSULTING SERVICES

ORGANIZATION PROFILE
Gilmore & Associates, Inc., is a regional civil engineering and consulting firm whose focus is 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 because of its legacy systems:

- A vast majority of clients (municipal agencies, mostly) 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 outstanding invoices because it lacked the ability to automatically send reminders.

The ERP Solution for BCT Partners

G&A, which had been using Unanet ERP AE for more than 12 years, added the Unanet Pay module in 2020 for invoice delivery and payment facilitation, gaining features like 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.

Unanet

Impact

Unanet Pay quickly began paying dividends for Gilmore & Associates:

- DSO has declined by five days, largely because of the firm's expanded electronic payments capability, resulting in an estimated $50,000 to $60,000 increase in monthly receipts.

- The time spent by accounting staff on check processing, check posting and redundant data entry has been cut by 2+ hours each week.

- The G&A accounting department can view recipient opens and clicks in real time to track customer engagement with emailed invoices.

- The number of Gilmore & Associates clients paying invoices electronically via the Unanet Pay portal has at least doubled.

- An elevated customer experience now that G&A clients can easily pay invoices online via the Unanet Pay portal, with flexible payment options.

"Unanet Pay has far exceeded our expectations. Because of it, we have increased cash flow and we're collecting from clients we didn't expect to ever collect from."

JEFFREY GILMORE, FINANCIAL SYSTEMS MANAGER
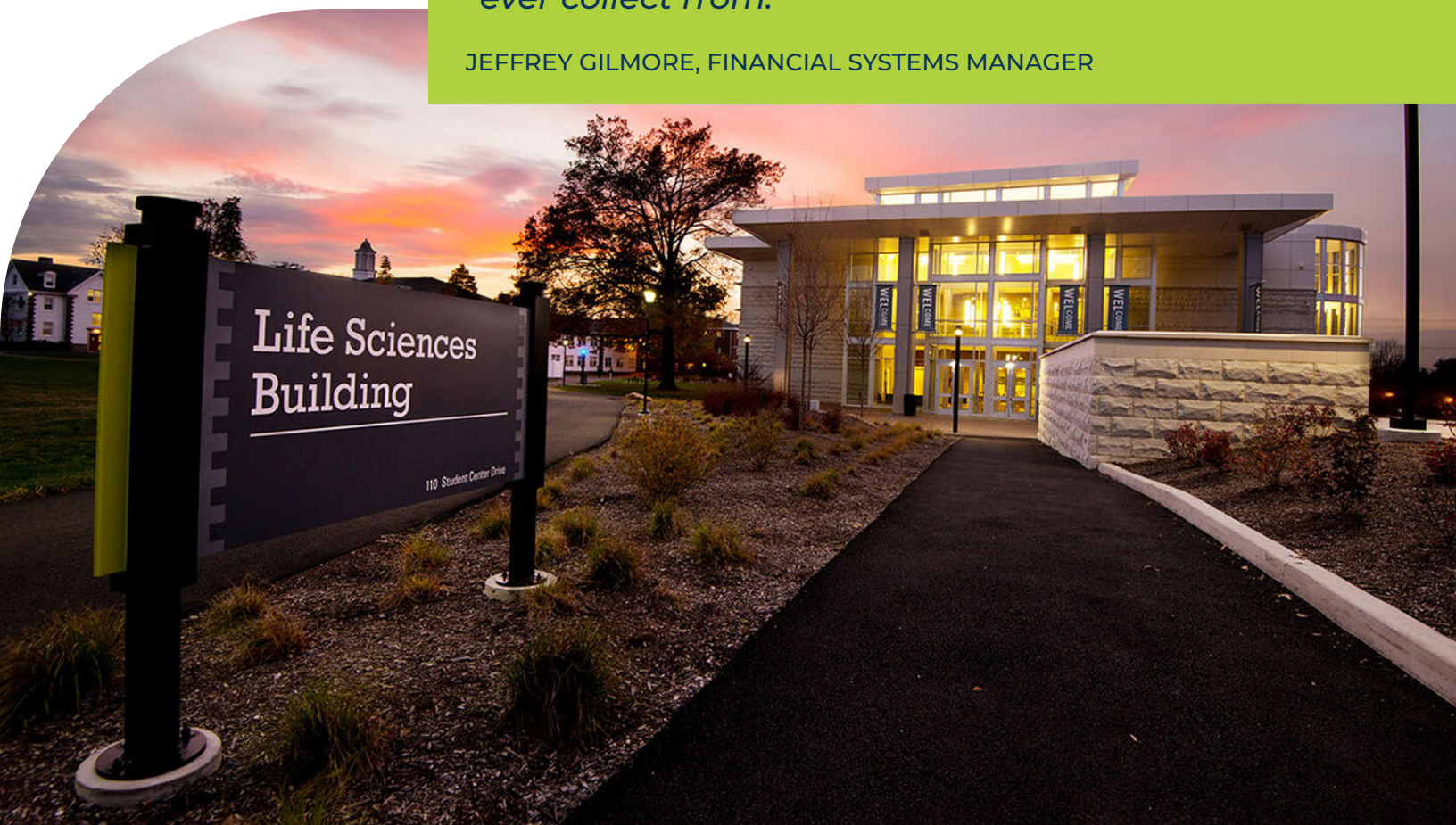
BEST PRACTICES FOR ERP SUCCESS

In a bottom-line focused business like AEC, quick time-to-value and maximum return from your ERP investment matter. The best practices detailed below will help get you there.

BEFORE CHOOSING AN ERP SOLUTION:

1. **Prioritize a purpose-built solution designed for project-based businesses.** Having a system that maps directly to your processes, systems and workflows speeds implementation/migration on the front end and leads to much stronger user engagement.

2. **Look for a solution you can use enterprise-wide.** Don't settle for piecemeal products. A patchwork approach could drag a firm right back to the inefficient, siloed and opaque world it sought to escape.

3. **Look for a mobile-enabled solution to support a field workforce.** A mobile app keeps your people connected wherever they're working and spares them tedious, time-consuming manual work.

4. **Don't cut corners in the due diligence process.** Evaluate multiple solutions, validate data, map your processes, gather feedback, consider factors like total cost of ownership, and test-drive the software prior to deciding.

5. **Be inclusive and collaborative in the selection and implementation processes.** Give all relevant facets of the business — IT, HR, business development, operations, project management, etc. — a voice in evaluation and selection.

6. **Look for a solution that comes with open integrations.** With the ability to seamlessly connect CRM, ERP and other key systems via pre-built integrations, a firm can build a full digital ecosystem.

7. **Don't settle for a lengthy 12-18 month implementation/migration timeline.** With strong vendor support, the process can be completed much faster.

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DURING AND AFTER IMPLEMENTATION:

1. Take a methodical approach to implementation. Create a detailed plan for a structured (but flexible) migration process.

2. Thoughtfully manage the change initiative. Communicate and communicate some more, ensuring people understand why you chose the software you did and how it will improve their workflow.

3. Make process automation a top priority. Doing away with manual, repetitive tasks and spreadsheet-heavy processes saves time, and improves the employee experience.

4. Take full advantage of support and educational resources. Your software provider should offer a robust library of training and educational assets, along with 24/7 support to get your issues resolved and questions answered promptly.

5. Encourage self-sufficiency as part of the training process. Motivate people to explore the software and learn how to use tools/functionalities, and let them know support resources are readily accessible should they need them.

6. Measure and document. Define, implement and closely monitor KPIs to gauge the impact of the system you're implementing.

7. Offer feedback to your provider. The best software providers not only value and welcome input from their customers, they act upon it to strengthen products and processes.

UNANET: BEST-IN-CLASS SOLUTIONS, BUILT FOR GROWTH

Unanet ERP AE

Unanet ERP AE turns information into actionable insights, better decision-making and accelerated growth. Here's why architecture, engineering and construction firms continue to choose it above other ERP products:

- **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.

- **A single ERP database and a single version of enterprise-wide truth to scale with a growing firm.** One of the biggest complaints we hear from customers about their legacy systems is that they spend way too much time trying to manage data across multiple siloed databases. One of the biggest compliments we get from customers once they have migrated to Unanet ERP AE is how nice it is to have a single, trusted firm-wide system for connecting and automating the project lifecycle.

- **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.** We never stop investing and innovating on behalf of our customers, with an aggressive release schedule that leaves our competitors in the dust.

- **A highly customer-driven product roadmap.** Customer feedback is critical to producing the continuous innovations that separate the best ERP products from the rest.

- **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.

Unanet

- **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.

- **A smooth migration experience for customers moving from another ERP system.** The migration team at Unanet has helped hundreds of firms move their data, systems and processes from legacy systems.

- **Designed, developed and supported in the U.S.A.** All Unanet solutions are designed, tested and quality-controlled onshore, right here in the U.S.A., with unlimited world-class support from U.S.-based agents.

THE NEXT STEP IS YOURS

To stick with the legacy software your firm has been using, and continue living with the consequences, or find a modern ERP system that will empower your business, teams and employees instead of holding them back? The tech infrastructure decisions an architecture, engineering and construction firm makes can reverberate across the business for years, even decades.

Our best advice: Do your research, weigh the factors that matter most to your firm and its people, and may the best solution for the job win.

If you're ready to shed the frustration and risk that comes with relying on outdated software, and you're interested in embarking on a rewarding ERP journey like those highlighted in these pages, the Unanet sales team would love to hear from you.

VISIT UNANET.COM TO LEARN MORE

Unanet is a leading provider of ERP and CRM solutions purpose-built for Government Contractors, AEC, and Professional Services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.

www.unanet.com