The Burt Group Wins More Business By Integrating Accounting System with Project Management Solution

How Leveraging Procore and the Sage 100 Contractor Integration Improved Collaboration and Boosted Margins

The Burt Group is a leading general contracting firm delivering top-tier buildings and interiors. Since 2002, they have built a reputation as an award-winning leader in construction with a focus on integrity, safety, and agile project completion. In an effort to integrate the team's accounting solution (Sage 100) with its project management solution (Procore), they decided to implement the Sage 100 Contractor integration.

THE BURT GROUP

LOCATION:
AUSTIN, TX

ANNUAL CONSTRUCTION VOLUME:
$100 MILLION

PRIMARY INDUSTRY:
COMMERCIAL & INSTITUTIONAL

"You've got your accounting people who want the balance sheet, income statement, and financial analyses. Then you've got your production people and construction managers making sure they're on budget, on time, and communicating with the field. Procore provides all of that in one nice package."

HEATHER MERZ
CFO
THE BURT GROUP

IMPROVED COLLABORATION

With an integrated solution, The Burt Group bridged the gap between its project management and accounting teams

REAL-TIME UPDATES

Procore's mobile functionality allowed teams to access and update information anytime, anywhere, from any Internet-connected device

CENTRALIZED DATA

Instead of using multiple solutions to manage projects, Procore offered one centralized hub for all project data

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The Challenge

The Burt Group used separate solutions for their project management and accounting needs. This meant that while the two teams worked hand-in-hand, their software solutions did not. Yet without the two systems in sync, teams had to manually double enter information, increasing the risk of human error. Plus, they lacked real-time insight into job costs.

> "Procore is going above and beyond to make sure not only does it integrate, but that it actually enhances what Sage provides right now."
>
> **HEATHER MERZ**
> CFO
> THE BURT GROUP

The Solution

INTEGRATED SYSTEM

By integrating with Procore, The Burt Group's financial team was able to keep their accounting solution of choice of over a decade, Sage 100, while seamlessly collaborating with the project management team.

ONE PLATFORM

Project managers no longer had to manually double enter data into two different systems, freeing them up to get back into the field to focus on more important tasks.

CENTRALIZED DATA

Regardless of whether teams were in the field or the office, they could access and update project information in real-time. With more accurate, up-to-date data, teams had better visibility into project profitability.

The Results

Instead of using multiple solutions to manage projects, Procore offered one centralized hub for all project data, saving time while ensuring accurate and up-to-date information. The integration also offered seamless communication between project management and accounting teams.

With Procore's unlimited user license model, collaborators could share and update information, regardless of how many employees were working on a project. Plus, with robust mobile functionality, teams could access information in real time from anywhere. This meant they had greater insight into project performance at any moment.

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The Story

After years of managing their project management and accounting information in disparate systems, The Burt Group realized that leveraging two systems for project management and accounting was no longer cutting it. They needed an integrated system that would seamlessly sync data between the two departments—one that would boost communication and streamline processes.
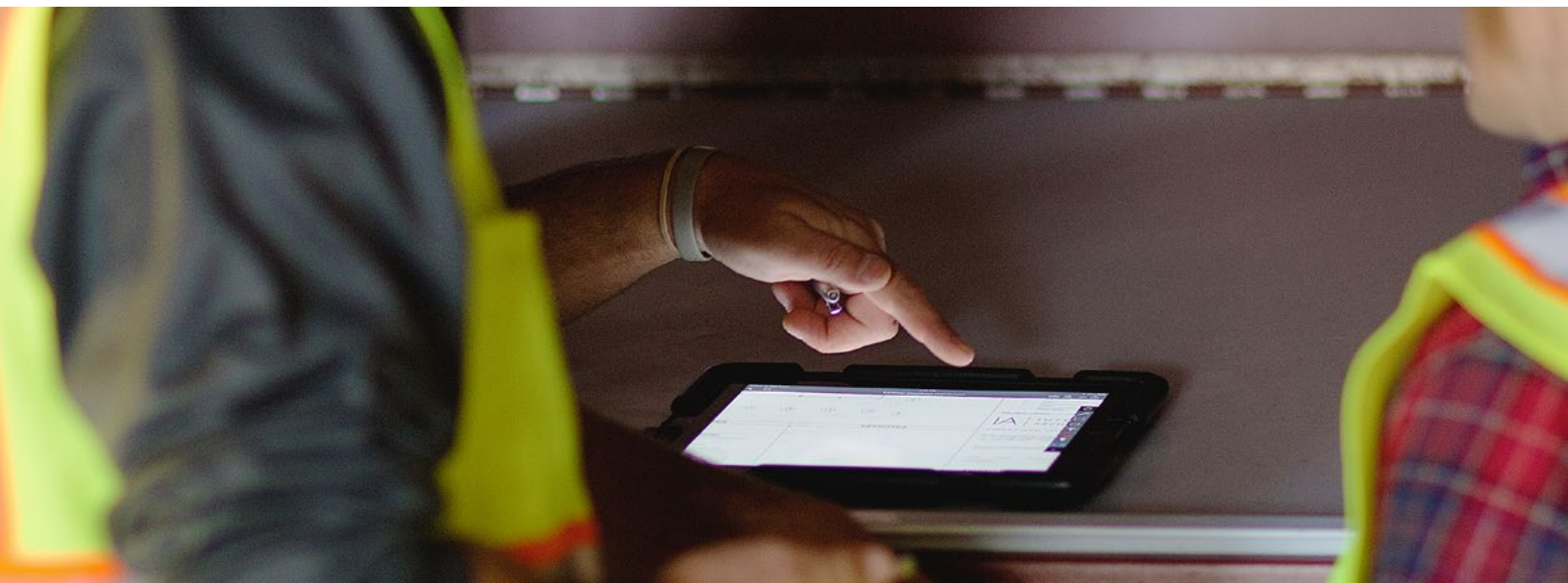
From Time-Consuming to Timely

For years, The Burt Group had used manual processes to manage projects. This made simple administrative tasks labor-intensive—not to mention it also increased the risk of human error.

"There were a lot of manual entries, and so we had to trust that our people were doing it right two times, because they had to enter it twice—once in Procore and once in Sage," explains CFO Heather Merz. "It was time-consuming, and then there was also the oversight—having someone oversee and review the double entries."

The other issue was that having separate systems for project management and accounting did not allow teams to get a comprehensive view of project health. Without all data in one centralized location, it was near impossible to run reports and analyze that information. Heather explains, "It just wasn't timely for us to run accurate, up-to-date, and detailed reports."

This posed a problem for her team. Although the two departments worked hand-in-hand on a daily basis, their software solutions hindered collaboration. She notes, "One of the cool things about our company is that we don't separate the two—accounting and finance is not on one side of the world on an island and then production and project management on the other. We work together a lot. So without them being integrated, it's hard to run a report that shows the impact that the construction costs are having on the financial reports from a corporate perspective."

Heather and her team knew something had to change—and soon.

Beta, Better, Best

In February 2018, The Burt Group hired an Operations Specialist tasked with auditing current processes. Soon after, he and his team identified a major roadblock: some of the more complex projects were asking for templates that were difficult for the project management team to produce. To resolve this, they realized they needed a software solution that standardized processes, but also offered flexibility for their team's unique needs.

The Burt Group just had one caveat: they knew they didn't want to switch both their project management and accounting software solutions. They had used Sage 100 since 2006, and they wanted to continue using it. That meant that any new project management solution would have to integrate with Sage 100. The Operations Specialist had used Procore previously and made the suggestion to the leadership team.

"We could see online and through our first initial contacts that Procore integrated with Sage 300, but not with Sage 100," Heather concedes. But, The Burt Group was in luck. Procore, alongside development partner hh2 Cloud Services, was in the process of developing the Sage 100 Contractor integration that would create the bridge between Procore and Sage.

"Procore quickly provided a team of people who were working on the integration who could give us insight on where it was at. Given the timing, they invited us to be part of the beta program. That allowed us to present that to the executive team and get the approvals to move forward with choosing Procore as our platform," Heather says.

For Heather, this is what truly set Procore apart: its commitment to developing the platform based on user feedback. She says, "Being a part of the beta shows that Procore is willing to listen to what our concerns are on the financial side. I just love the fact that they listen—they really do listen. They don't just get on these calls and say, 'Well, this is what we're designing it to do.' It's never been like that. It's always been, 'Tell me, when you see this dashboard, what stands out to you? What else would you maybe want to see on a dashboard? What quick information do you guys use?' Then they listen to that, and a lot of times it's added almost instantly, which is huge."

This, she says, has made all the difference. "I really feel like it's more of a partnership than just a traditional sales/customer relationship. I feel like we've really built a relationship and that we're going to work together long-term."

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One Team, One System

With the Sage 100 Contractor integration, all information—from project management to accounting—was all located in one centralized location. Continuous syncing between Sage and Procore offered team members the most up-to-date, accurate information. Plus, with Procore's mobile functionality and unlimited user license model, all collaborators could access data anytime, anywhere.

For Heather, the move from two systems to one has boosted the company's project management and accounting capabilities alike. "Procore is going above and beyond to make sure not only does it integrate, but that it actually enhances what Sage provides right now."

She notes that connecting the two sides of the business has offered less tangible benefits as well. "One is from a morale perspective: we can all be happy and excited that our programs talk to each other. You've got your accounting people, who want to have the balance sheet, the income statement, and look at the financial analyses. Then you've got your production people and construction managers whose primary focus is to make sure they're on budget, on time with their jobs, and communicating with the field. Procore provides all of that in one nice package."

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> CFO
> THE BURT GROUP

In doing so, she explains that Procore has helped boost collaboration across teams. "We can get in the same room and be excited about the fact that our two softwares are not only talking, but they're integrating instantly on the cloud. We can run reports without asking project management teams to do double work or having them get something in a format they're not used to. It just creates efficiencies and also some camaraderie. Now teams can do what they need to do all in one place."

Heather notes that in addition to the benefits seen within their organization, other companies have taken notice as well—especially during the bidding process. "We can clearly state we have Procore

and the Sage 100 Contractor integration, and the two are in constant sync. That's huge, because we're able to work together as a team," she pauses, emphasizing the word team. "Our focus becomes the same. We constantly have real-time data, and so if our clients ask a question, we can provide the answer whether it be from a financial or scheduling perspective. Are we on budget? Are we on time? How is this sub performing? All that is right there."

Ultimately, Heather says that Procore has bridged the gap between the two sides of the business. This has not only allowed them to become more efficient and productive, it has also boosted profit margins. This, she says, all stems from greater collaboration.

"Our tagline at The Burt Group is 'One Team'—we're all on the same team. No matter what your role is here, we're all working together, and I think Procore does a good job of realizing that if the accounting people aren't happy, then more likely than not, the project management team isn't happy either because we're going to be harping on them to get us their data so we can enter it. We all need to be connected."

Produced by
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