

CASE STUDY

Petersen Brothers' Construction

Challenge

For years, Petersen Brothers Construction had used an array of programs and handwritten reports to manage their projects. However, as more people joined their team, they wanted to streamline their processes with one centralized platform that not only provided robust project management tools but financial tools as well.

Solution

With Procore's cloud-based platform, Petersen Brothers had access to the comprehensive toolset they needed as well as a vast selection of additional features. Most notably, Procore offered an entire integrated financial "ecosystem," complete with invoice management and innovative integrations.

PROCORE[®]

Specializing in the construction of commercial projects and known for their steel buildings, Petersen Brothers has nearly 50 years of expertise in the industry. For years, they had been using Excel documents, handwritten daily reports, and upwards of ten different programs to manage projects. Although it had worked for a smaller team, the system was not scalable. As the team began to grow, they knew they needed a more streamlined solution.

Consolidating to One Centralized Platform]

It was in early 2016 that Petersen Brothers' Project Development Manager Andrew DiPietro began searching for a single software solution. While many claimed to be comprehensive, nearly all of them only excelled in one area—either project management or financials. However, Andrew and his team needed an integrated solution that did not favor one over the other. He recalls that what set Procore apart was that it was a robust solution that performed well across the board.

“Procore emphasized the mobile side, the desktop side, and all of the tools were complete. They’re not just patched together. They’re well thought-out, and it made it really easy for us to choose Procore. The apps were frequently updated and improvements made regularly which showed us that there was the importance of the mobile side staying current with the desktop version.”

Deciding to partner with Procore in June of 2017, Petersen Brothers onboarded with the full suite of Procore tools including Project Management, Construction Financials, Quality and Safety, and Field Productivity.



Procore's Financials Ecosystem

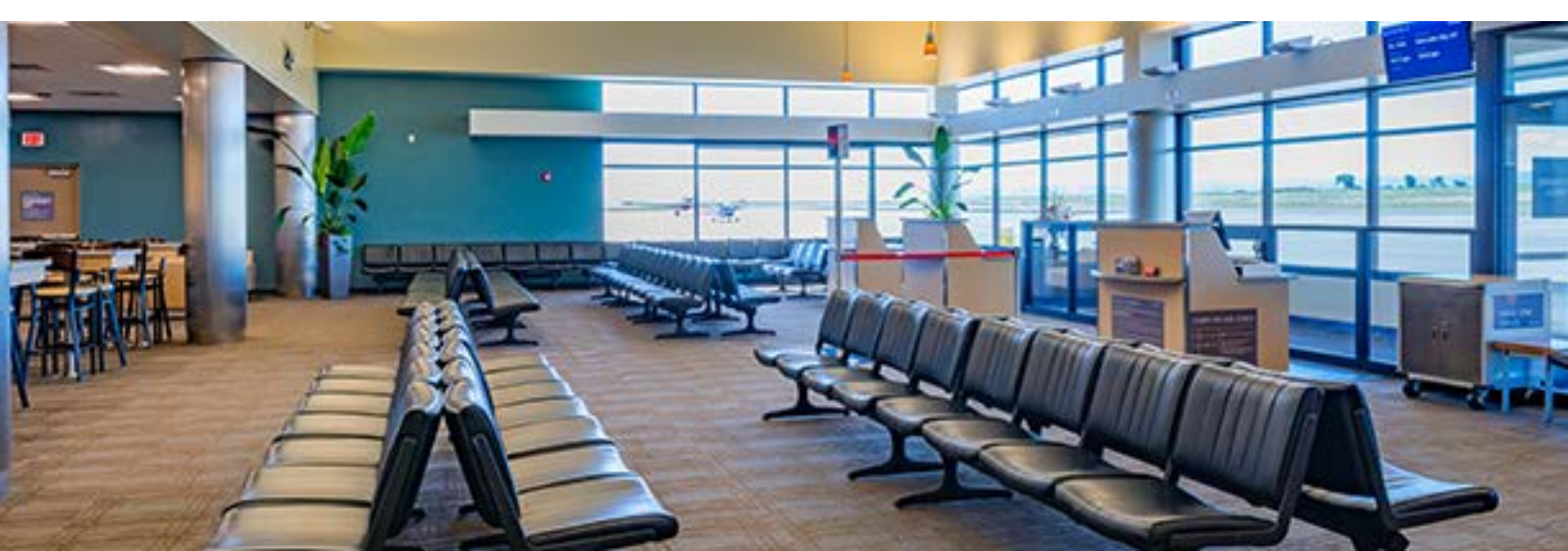
What the team quickly realized was that Procore's capabilities extended far beyond simply the core tools. They found Construction Financials to be crucial in helping project teams manage costs in real time, while giving executives visibility into project health at any given moment. But that wasn't all. Procore offered an entire financial "ecosystem"—complete with these core tools, invoice management, and integrations—that allowed project teams to manage all important financial data in one centralized location.

One key integration for Petersen Brothers was QuickBooks, which helped streamline accounting items for commitments and change orders. It also eliminated double entry and improved communication between accounting and project management teams. Another integration, DocuSign, allowed collaborators to easily and quickly sign documents such as contracts, purchase orders, and invoices to help move projects forward. Andrew notes that about 85-95 percent of their paperwork now goes through DocuSign. With these integrations, he says that what was "a lot of work before, is just a simple step to go through now."

With a successful implementation underway, Petersen Brothers decided to try Procore's invoice management tools as beta users. With the new tools, owner invoices were easily pre-filled with subcontractor and other miscellaneous invoices. This helped Petersen Brothers reduce double entry, expedite the process, and helped them better manage subcontractor invoices. The system also attached signed invoices, lien waivers, and other costs as a single PDF to the owner's invoice, saving the user time. What used to take days now took minutes to complete.

"We're done with the invoice in minutes. It's all there in Procore, and it works so much faster." Andrew pauses and adds, "We're talking about minutes versus a full day's worth of work."

With Procore's user-friendly interface, employees quickly learned and utilized the new payout system. It was so easy, in fact, that Andrew says employees only needed 5-6 hours to get up-to-speed. Subcontractors also found the platform to be much easier to use; today, upward of 70% of submitted requisitions now go through Procore.



Improved Communication Among Collaborators

Procore's integrated financial "ecosystem" has also greatly enhanced Petersen Brothers' relationship with subcontractors. Instead of using cumbersome systems like email or Excel, Procore's platform allows collaborators to share and update important information (such as feedback on requisitions) in one centralized platform.

Andrew recalls that before Procore, because of overzealous spam filters, they would often miss requisition emails from one of their primary concrete subcontractors. Now with Procore, the process is completed directly within the platform, eliminating the possibility of lost or delayed invoices. The process is now not only effortless, but it has also improved turnaround time.

In addition, Procore's unlimited licensing allows users—from the field to the office—to access and manage important project data at any time. Andrew says that in one case, they even collaborated with an owner's banker to help streamline the financial review and approval process.

"The banker, the owner, the owner's rep, and the architect can all log in to Procore, and there's not a lot of clicks to get the information they need. In their world, they don't want a lot of clicks—they want information, fast. It's very efficient," Andrew says.

A New Industry Standard

Andrew notes that Procore has become a vital tool for both general contractors and subcontractors, making it a keystone in today's project management process.

"Procore's great. We know other general contractors in the area are starting to use Procore more, so we are hearing our subs say more and more, 'Everybody's going with Procore.' It makes it easy. They just log out of their company, and log into another one. It is sort of turning into an industry standard."

For Andrew, Procore is not simply a way to streamline project management and financial processes. Rather, in today's industry, innovative and comprehensive platforms like Procore's are almost becoming a necessity. "People may be stuck with how they've been doing business for the last 10, 15, or 30 years because that's been their industry standard." Instead, he suggests, "Set aside your requirements for how you normally do business, and allow what Procore has standardized to be your procedure—you'll save yourself lots of money. Lots of time, lots of money."

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ANDREW DIPIETRO

Project Development Manager,
Petersen Brothers' Construction

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