

CASE STUDY

Ryan Companies

Challenge

After nearly a decade of using their previous project management software, Ryan Companies began searching for a more streamlined solution that offered greater functionality, particularly with mobility. Partnering with Procore, they began using the platform as their primary system for their documentation needs in 2017 with the intention of phasing in the financial components at a later date. The main obstacle ahead of them was integrating their accounting program, JD Edwards, with Procore.

Solution

Working collaboratively, Procore and Ryan Companies developed the JD Edwards integration. This not only consolidated Ryan Companies' systems onto one centralized platform and streamlined their processes, but it also helped bridge the gap between their office and field teams.

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As a national leader in commercial real estate services, Ryan Companies is known as a pioneer in the construction space. It was only natural then that they were integral in developing and successfully implementing one of the most groundbreaking construction financial integrations to date. In an effort to consolidate their project management and accounting systems, they helped build the JD Edwards integration with Procore's platform, thereby becoming one of the first ENR Top 100 companies to fully integrate their accounting data with their construction project management solution.

Moving to a Comprehensive Platform

Ryan Companies had used their previous software solution for project management and accounting needs for nearly a decade. As the industry began to evolve—as did their project teams—they realized they needed a more streamlined solution that also offered top-tier mobile capabilities. They began searching for alternatives and set up various trials for employees. On a monthly basis, they collected data on usability, intuitiveness, and time savings.

Director of Project Controls Morgan Traynor recalls, “Drawings, RFIs, and submittals were the three big pieces where our project managers were saying, ‘I’m saving an abundance of time by using Procore versus other tools.’ Our users were telling us ‘Procore is the way to go. We have to go with Procore.’”

Ryan Companies did just that, and in January of 2017, they began utilizing the Project Management, Field Productivity, and Quality & Safety tools. Shortly thereafter, they decided to implement Procore Construction Financials. Morgan says, “Because of the wild success that we had with the initial documentation components, we wanted to consolidate our toolset with Procore on the financial side as well.”

For Ryan Companies, the use of Construction Financials coupled with Procore's mobile capabilities proved to be a powerful tool for field teams, providing them access to pertinent financial data. Morgan says, “With Procore, we have the ability to leverage our financial information on a mobile device—which we did not have before—and allow our field teams the opportunity to be more involved in financial management and decision-making. They access the information on their iPhone or iPad, which enables a collaborative team environment when all team members have visibility.”

From Test to Success

After implementing Construction Financials, Procore became their project teams' primary system for all financial needs. Yet at the same time, their office teams' primary accounting program was still in a separate Enterprise Resource Planning (ERP) system, JD Edwards. In an effort to connect the two systems, Ryan Companies decided in September of 2017 to help develop an integration. Built in collaboration with Morpheus Technology Group (a third-party middleware company), the integration helps bridge the gap between field teams using Construction Financials and office teams using JD Edwards for accounting purposes.

By integrating jobs and projects, suppliers and vendors, and accounts and cost codes, the integration helped ensure that jobs and job costs were in sync. It tied together all project dollars—including budgeted, committed, and actual dollars—enabling accurate forecasting in Procore. Furthermore, it gave all collaborators real-time access to important financial information, even on their mobile device. This ultimately allowed on-site employees to make informed decisions while giving accounting teams the ability to retain full control of data pushed into the ERP system.

“Consolidating our toolset from two down to one was a really big deal—it allowed our users to know exactly where to go and to be more proficient in that tool because they were using it every day. From a training and best practice standpoint, we are able to share a consistent message about the use of Procore which helps tremendously when pushing consistency across our national offices.”

Having roughly 35 projects totaling about \$350 million in revenue as trial projects, Ryan Companies rolled out the JD Edwards integration so that teams had the opportunity to provide feedback and help develop features that were tailored to their needs. Employees began using Procore for managing items like the budget, revenue and expense contracts, change orders, change events, vendor management, and monthly profit projections. In addition, invoices, subcontractor pay applications, and direct costs (like time entry) were automatically pushed from JD Edwards to Procore.

“By automating our process, we are allowing our users to focus on what they need to focus on, rather than accounting validating,” Morgan says.

After using the 35 pilot projects to help develop the integration, Ryan Companies decided to launch company-wide on June 1, 2018. This meant increasing projects that were using the integration from 35 to 100 overnight, from about 100 team members to nearly 800, and adding 50 new projects (on average) per month.

“We really do feel like we’ve been in a partnership with Procore’s financial teams. And we are pretty excited that we’re one of the first to be fully integrated with all of the tools that Procore has available,” Morgan says.

Bridging the Gap Between the Field and the Office

With all project data—both financial and non-financial—managed within Procore, collaborators can now monitor information in real time, giving both on-site and off-site team members visibility into project health at any given moment. Procore's user-friendly interface, robust toolset, and increased functionality help boost project efficiency and collaboration. They can now update and access information from one system, thereby providing one source of truth, increasing communication across teams, and standardizing processes.

“We are promoting a best practice and a standard for the way in which we manage our finances that's consistent across Ryan Companies. All of our users know exactly where to go in Procore if they're looking for something. They can expect that all of their construction financials are in Procore and, more importantly, are accurate.”

As one of the first ENR Top 100 companies to work with Procore on the integration, Ryan Companies played a key role in developing its capabilities. Yet while the integration has no doubt helped create efficiencies for Ryan Companies' employees, the implications reach much further; they have helped create a tool that adds value to the industry as a whole.

Morgan reflects, “I think we have helped shape what some of these financial pieces look like, and we love being a part of that discovery and helping to grow the toolset in a way that not only benefits us but is going to benefit all the other billion-dollar-plus GCs that are out there.”

Vintage on Selby, St. Paul MN



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MORGAN TRAYNOR

Director of Project Controls, Ryan Companies

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