

CASE STUDY

The Weitz Company

Challenge

After 15 years of managing construction projects on two systems, The Weitz Company realized it was time for a change. Operational and financial tasks were assigned to separate platforms, making information scattered, difficult to find, and cumbersome to share. The leadership team decided to streamline to a single software solution.

Solution

Weitz turned to Procore to help consolidate separate financials, organize project management processes, and locate all data in a single, user-friendly platform. For an organization as large as Weitz, the sixth oldest A/E/C firm in the U.S. ranking No. 47 on Engineering News-Record's Top 400 Contractors list, a seamless transition was critical.

PROCORE[®]

As the Vice President of Operational Excellence at The Weitz Company, Karmyn Babcock knew transitioning to a single project management software solution with an easy financial integration was crucial to helping Weitz manage projects more efficiently. Weitz, a full-service general contractor, design-builder, and construction manager with offices nationwide, needed a platform that could facilitate an easy rollout across such a large organization. As the go-to individual who manages the training, people development, and innovation within the technology space at the company, Karmyn's duty was to figure out how and what that would look like.

The Path to Procore

For 15 years, Weitz had operated between two management systems. This meant its operations teams would have to toggle between each, entering contracts and change management items in one and viewing forecasting and cost details in the other.

Senior IT Manager Steve McClure, who helped support the integration alongside Karmyn, notes the switch to Procore arose out of a fundamental operational need. He and his team needed to have operational staff using one system, thereby removing the cumbersome task of “bouncing back and forth trying to keep two systems in check in their mind.”

Due to these inefficiencies, Karmyn and Steve decided to find a solution that could integrate with both functionalities. Weitz also had strict requirements for the new solution such as having field management features to oversee punch lists, inspections, and quality. It also needed to have traditional project management capabilities including document controls, submittals, and RFIs. So how did these prerequisites lead Weitz to Procore in the end?

“We didn't just decide, ‘Hey, we want to integrate these two things.’ We already had a very established business process and expectations from operations on how that information would be handled and needed to at least do something of equal value or greater value,” Karmyn explains.

That “equal value or greater value” turned out to be Procore which had all the components that Weitz required. The platform allowed its operations team to consolidate tasks by integrating financial reporting and financial business processes into JD Edwards, the financial system that they used.

“It just made a lot of sense. It's been a pain point for us for about 15 years. Before Procore, the tools didn't really exist that lent themselves to easily doing that,” says Karmyn.

From the Ground Up

Headquartered in Des Moines, Iowa, with locations throughout the U.S., The Weitz Company needed a strategic plan of attack for the rollout. Two-day classroom-style trainings in each location with heavy emphasis on the modules and documentation provided by Procore were scheduled. After each project kick-off, the leadership team offered additional “on the ground” follow-up training as well as assigning regional “local champions” who offered supplemental training for staff.

Manager of Operational Excellence Byron Bartlo says, “We’re hitting each of our business units as their main jobs come on board. We’re trying to hit the teams two months before their job starts so they get trained but so it’s still fresh when the job starts. We are going to utilize Procore’s tutorials and trainings as well to get information to the team so they can do supplemental training on their own.”

Leaving Pain Points Behind

When it came to integrations, Weitz took full advantage of Procore’s robust capabilities. They integrated Address Book which Karmyn explains “is the backbone of all transactions.” They also integrated budgets, commitments, contracts, and approved changes.

“We’re doing line-level detail of those transactions. So, it’s not just the balance that gets transitioned over. It’s the actual detailed information, ‘This person was charged to payroll at this dollar amount for this week at this quantity of hours.’ You can see that level of information inside of the Procore window,” Karmyn says.

Ultimately, consolidating Weitz’s dual-system issue was critical in making its financial and project management systems work in tandem, rather than complicating processes.

“Operations now has a full forecasting view with all of its commitments and pending commitments and things that are out there. We couldn’t see all of that before. And then all of the actual costs, of course. The financial system (JDEdwards or ERP) now just has the real hard cost and hard revenue that’s going on in the project right now, which wasn’t really a goal we started out with, but it’s been a nice benefit,” says Karmyn.

Consolidating systems not only made training new hires easier for Weitz’s leadership team, but it was also well received among veteran employees. Staff readily provided feedback to Karmyn and her team, praising the platform for its user-friendly interface and capabilities which allowed them to find information quicker and more easily while also helping them to be more productive.

“The first check-in call, we had three unsolicited, ‘This is great!’ responses,” recalls Byron Bartlo, manager in operational excellence. “We heard, ‘It’s so much easier. We’re setting up contracts.’ It was just the information being there and the ease of moving through the system. They were really excited.”

Karmyn adds, “I think the interface is very easy for our users to understand and navigate around and see where their information is and the customizable views that have been added really enhance that capability.”

Pulling It All Together

So with a successful rollout of the platform well underway, we wanted to know: what were some of the high-level takeaways that The Weitz Company experienced from the integration?

“The integration is really going to help teams understand where the project is going and make the changes they need to accordingly a lot quicker,” Byron says.

On a more global scale, the team at Weitz estimates that the total time saved from the new integration adds up to countless hours for each employee every month.

“I would say it’s probably a half day a month for our operations leadership particularly. So, there’s that piece. But then there’s at a leadership level having better information readily available within the tool,” says Karmyn.

In spite of its size—or perhaps because of it—Weitz has proved that the adoption of Procore and its financial integration has led to significant improvements for its construction management teams across the whole organization. Whether on the operational, financial, or leadership team, regardless of region, that’s something the entire company can agree on.

The Oasis at Sagewood, Phoenix AZ



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BYRON BARTLO

Manager in Operational Excellence, The Weitz Company

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