

CASE STUDY

Wells Construction



CLIENT: WELLS CONSTRUCTION

CHALLENGE: Wells' project managers had to wait hours for accounting information in order to make decisions and keep projects moving at a successful pace. Wells needed an easy way to share accounting data with their project managers without the need to repeatedly contact accounting for information.

SOLUTION: Now that the California-based firm uses Procore and its Sage 300 CRE Connector, their accounting department and project teams can work seamlessly with one another with accurate financial data in one place. Decisions can be made faster and with more confidence, without having to contact accounting for financial information.



Wells Construction is a general contractor that has been in business for 26 years with a diverse variety of projects, mainly remodels and ground-up projects up to \$5 million.

“We’ve been using Procore for two years and Bobby, our associate project manager, was the person who led the way, worked with Procore, and established how we use Procore today,” said Sylvia, the company’s controller.

Bobby uses every tool in Procore to its highest level and claims it just keeps getting better. “Just as our project types vary significantly, the depth in which we use Procore varies,” Bobby says. “We may only use four or five of the tabs for one project, while another project uses all of them.”



MANAGING THE FINANCIAL SIDE OF PROJECTS

Bobby explains: “Once the Budget Tool was created, it correlated with the SOV as opposed to the SOV serving as the budget itself. This enabled us to use the pay applications within Procore to bill our clients, eliminating the need to create billings outside of Procore.”

“I think in the last three months, we have tried to use Procore’s payment application as often as we can,” Sylvia said.

Bobby believes the staff is getting better at the processes. That’s the big thing this year—locking down the processes so they can use more of the global tools in Procore from the administrative viewpoint to see overall company profitability, while continuing to use job tracking on a micro level. They plan to continue improving their processes so that they can use more and more macro level views.

USING PROCORE WITH SAGE 300 CRE

Sylvia is excited by the amount of time the Sage 300 CRE Connector is saving the company. She says Sage has integrated really well. It’s saving the company ample time and allows them to spend more time on their projects and even get additional work. That is another one of the company’s goals—to increase sales by 25% this year. Bobby estimates Procore’s Sage 300 CRE Connector has saved 5% to 10% of his time and allows him to reallocate the use of his time on a weekly basis.

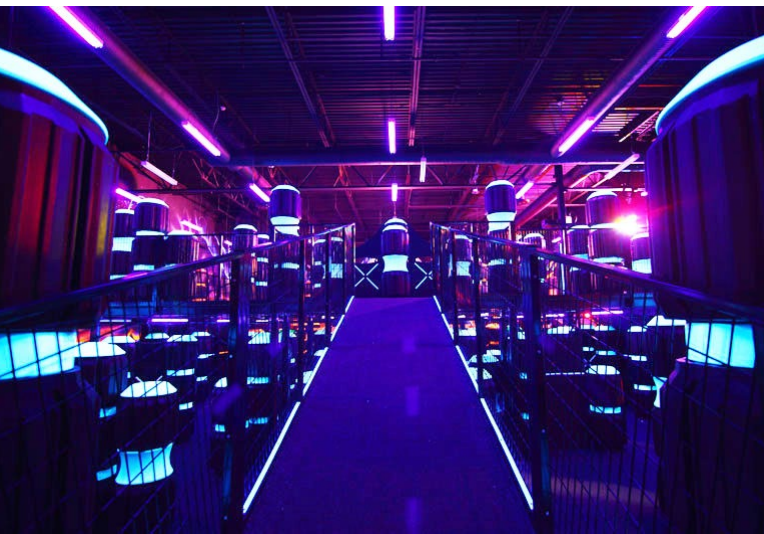
“The biggest hurdle was the transition from the old accounting software to Sage 300 CRE,” Bobby remarks. The actual connection between Procore and Sage has been pretty seamless and Procore has supported them every step of the way. “We’ve had a lot of input from Procore as to what we needed on the Sage side and how the data was going to get transferred,” Bobby says.

PROCORE'S CUSTOMER SERVICE

The integration has evolved to the point where the customer service is seamless. If Sylvia has a question about the Sage 300 CRE Connector, she goes straight to her contact at Procore. Bobby has had the same experience. If he has any questions or concerns about the tools in Procore, he contacts Procore directly, whether it's through the chat-based support or calling his representative.

"When it comes to service, I feel like we got a software team and a consulting team all in one when we purchased Procore. Overall, their support is the best I've ever encountered because I can have an issue and then in real time contact someone and have it addressed. Even if they can't fix it right then and there, they're very good at following up," says Bobby.

Bobby continues: "I had an issue with the Budget Tool yesterday and they were aware of it. This morning we got an email saying it was resolved. A lot of times you'll bring up an issue with a company and they'll say they'll get back to you and they never do, so Procore is really, really strong in that sense."



WHY PROCORE?

Procore's best-in-class project management tools, integrated with Sage 300 CRE, offer an unmatched comprehensive solution for construction companies. With Sage being the hub for all Wells Construction's accounting processes, like the general ledger and job costs, certain information flows from Procore to Sage and vice versa. Wells is able to create jobs and commitments in Procore as opposed to having to create them in both systems; the connectivity has eliminated that redundancy.

At Wells Construction, everybody in the field has access to the Sage 300 CRE Connector in Procore. Bobby uses the accounting data before meetings, so the right people have visibility to Sage information on some level. The whole accounting department, which includes eight staff members, also uses Sage to manage their accounts.

On the other hand, essentially the entire company uses Procore; everyone from the superintendent level up, totalling around 50 employees. Superintendents use it to do their daily field reports, look at contracts, and arrange schedules. It's used at every level, from project management to accounting.

With the Sage 300 CRE integration, information that needs to be synced into Sage is brought into Procore, enabling project managers and users without Sage licenses to access it.

Procore has been a great marketing asset for Wells Construction when they negotiate jobs with clients and work with architects, Sylvia says.

"I think Procore itself has been a marketing tool for us prior to the Sage 300 CRE Connector because we often act more like a CM-at-risk than a general contractor, so we're dealing with clientele that need higher levels of transparency into the project. We show them the tools and how easy they are to use, so Procore has been instrumental in attracting more business. Our competitors don't have that capacity and their clients are left in the dark on a lot of things, whereas the tools we have allow them to see pretty much everything we want them to see."

Bobby is convinced that the Sage 300 CRE Connector is invaluable with regard to marketing on cost-plus type projects where they have to deal with a construction manager, a bank, or someone that needs to see up-to-date job costs. By presenting that information to those external project team members in much less time than it used to take, Procore provides Wells with a competitive advantage that they can use to sell to clients.

Sylvia is impressed with the “phenomenal level of service” Wells Construction receives from Procore. “Everybody at Procore who has worked with us at every level has been great,” she said.

“With the other integrations and software rollouts that I’ve been involved with, we’ve always had to pay for either some outside training or consultants to come in and they were only available for a finite amount of time. Now we’re in close contact with the Procore team as they build new features, which is really exciting.”



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Bobby DeWeese
Associate Project Manager

WHO USES PROCORE?

General Contractors // Owners // Engineering Firms
Specialty Contractors // Construction Management Firms

BENEFITS

Improved Communication
Mobile Access
Increased Productivity
& Accountability
Flat Rate Pricing
Unlimited Users
Unlimited, Secure File Storage
Easy to Use
Superior Customer Support
Risk Prevention

FEATURES

Drawing & Document Management
Accounting Integration
Contract & Change Management
Bidding
Daily Logs
RFIs
Submittals
Punch List
Meetings
Photos

