

NexTec's BI solution results in precise budgeting at ACRT

ACRT

Industry

Vegetation management for utility industry

Location

Akron, Ohio

System

Microsoft Dynamics GP Solver BI360

Challenge

Project managers in the field needed both better budgeting tools and easier access to data in the form of timely reports.

Solution

ACRT relied on NexTec to select, install, and customize business intelligence software. NexTec experts worked with ACRT's finance team to create easy-to-use budgeting tools and dashboards, plus a wide range of customized reports.

Results

- With accurate budget projections, ACRT achieved a 2015 revenue actual within 1% of budget
- Dashboard user interface enables ACRT managers to quickly identify and control low-margin projects
- Accurate, accessible data improves communications between finance and operations.

As much as we love a world filled with trees and greenery, for utility companies vegetation spells danger and disruption. Approximately 30 percent of all power outages in the US are caused by trees. Utility companies need to respond quickly to an outage, and they need to be pro-active about removing branches and brush before outages occur.

ACRT, the largest independent utility vegetation management (VM) company in the US, provides utility-industry clients with consulting, training, and VM services, enabling companies to reduce risk, maintain service, and save time and money. ACRT project managers in regional offices around the country manage clients, budgets, and staffing. These managers need rapid access to financial systems, timely and accurate data, and easy-to-use budgeting tools and web-based dashboards. NexTec Group consultants installed and customized the Solver BI360 business intelligence solution to give ACRT managers the tools they need.

“BI360 removed the confusion about financial data. It makes performance feedback believable for our frontline managers.”

Brad Schroeder, CFO, ACRT

Need for real-time feedback

When Brad Schroeder came on as CFO in 2012, ACRT was experiencing a high demand for its services. But when it came to budgeting, the finance team and managers in the field were frustrated. Managers lacked real-time feedback on the costs and margins of their proposed project budgets, and didn't like hearing weeks later that their estimates were off.

Schroeder saw a need for a centralized data warehouse along with easy-to-use tools so managers could create accurate budgets and subsequently track project expenses.

“Each customer is looking for service that is a little different,” Schroeder says. The company's project managers were creating customized budgets to meet each client's needs, but they weren't confident that the budgets would produce the right profit margin.

“It was clear that managers needed a user-friendly interface with drop-down tools so could they prepare project budgets with headcount and labor cost by employee type,” he recalls.





Schroeder and his finance team turned to NexTec Group, which already supported the company's installation of Microsoft Dynamics GP. NexTec's business intelligence experts recommended Solver's BI360 solution.

NexTec delivers the power of BI360

BI360 comprises four modules that can be used together or in a mix-and-match fashion. It offers Microsoft Excel-based reporting, Microsoft Excel-based planning, web-based dashboards, and a Microsoft SQL server-based, preconfigured, data warehouse. NexTec experts worked with ACRT's finance team to install BI360, configuring the data warehouse and dashboards and training the team to create reports.

"BI360 is one of the most powerful automatic tools I've come across," says Michael Fleisher, Manager of Accounting. "But there is a learning curve. So NexTec's training was essential — we got a grasp on it and everything started coming together."



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Customizing BI360 to match the needs

NexTec's business intelligence experts worked extensively with ACRT to develop the customized dashboard for project managers and train the finance team to create reports.

Schroeder praises the work of the NexTec expert who led their installation and training. NexTec did all the development work on the budgeting templates and trained ACRT finance staff to use the BI360 software to generate reports.

"She was instrumental in helping us analyze our needs and our capabilities," Schroeder says. "We thought we had to build some custom applications, but we realized that the BI360 tools were more intuitive and could get us to the same place."

Timely reports, better decisions

A priority for ACRT was getting timely reports back to project managers. Before installing BI360, reports could take more than a month to produce. This was a particular problem when it came to analyzing labor costs.

"This company lives and dies on hourly labor costs," Schroeder says. "But we didn't have a strong picture for hourly labor costs until five weeks after the costs had occurred. If we had a lot of overtime, we didn't know it."

"We did everything in our power to automate reports," Fleischer says. "Before BI360, the report on hours in the field was taking six hours of copying and pasting from spreadsheets to put together. NexTec helped us build an "hours report" that's automatic."

Contact us to learn more:

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BI Success Story: ACRT

Accurate budgets make a bottom-line difference

The first year ACRT had BI360 in operation, company revenue came in within one percentage point of budget projections.

"The business intelligence system NexTec developed for us has allowed us to identify those projects that were not profitable," Brad says. "You could look at them as high revenue, but then the data showed there was no profit. Now our managers can quickly identify projects like that and make the correct decisions."

Once a project is underway, BI360 reports enable project managers to keep them on budget.

"Our managers have reduced overtime and improved productivity," Schroeder says. "We're hitting our budget targets because the numbers are credible and managers can easily drill down in the data to see how they are performing."

Automating reports has saved the finance department itself time and money.

"Overall, the BI360 system has definitely paid for itself," says Tom Blair, Manager of Information Technology.

Business intelligence builds a culture of trust

According to Schroeder, NexTec's business intelligence solution has changed more than just access to data.

"This drives a cultural change," he says. "We have transparency and simplicity, and the result is more positive feelings about the organization."

About NexTec Group

NexTec Group is an award-winning business software consulting firm offering ERP, CRM, BI, Cloud and on-premise solutions to mid-sized businesses. Embrace technology, transform your business.