CASE STUDY

How an accounting system upgrade made it possible for a premier design/build firm to process 30% more revenue without a change to staffing.

Neil Kelly

Case Study: Neil Kelly and Sage Intacct

> "Sage Intacct is just a cleaner system, more accessible, more user friendly and more intuitive." **Emily Porter** | Neil Kelly CFO

Neil Kelly is a multi-faceted design/build remodel and home improvement company serving communities in the Northwest. They have divisions specializing in remodeling projects, exterior renovation, and custom homes.

Since its start in 1947, Neil Kelly's innovative approach toward finding new ways to add value for their clients has led to the company's continuous growth and expansion of services. However, one aspect of their business remained unchanged for 20+ years - their accounting software.

THE PROBLEM
Sage 300 Construction and Real Estate

Neil Kelly's CFO, Emily Porter, started her career at the company 2.5 years ago as a controller. Once she began work in their Sage 300 CRE software, she found she had inherited an outdated and cluttered system, whose lack of automation caused inefficiencies in their accounting practices.

COMPANY OVERVIEW

Neil Kelly Company is one of the largest design/build remodeling firms in the country, with more than 30,000 projects completed in Oregon and Washington. Their range of services include design-build remodeling, custom construction, handyman services, energy retrofits and solar power. For over 70 years, this family owned business has been nationally recognized for their award-winning design, innovative practices, outstanding craftsmanship and community engagement. For more information, visit neilkelly.com.

EXECUTIVE SUMMARY

Previous Software:
Sage 300 Construction & Real Estate

Results with Sockeye:

- Substantial Time Savings from automated data entry across their timekeeping and payroll systems

- Provided custom integrations needed to track job costs at a granular level across all systems

- Granted remote access to contracts and billing data through real-time financial dashboards

Large Amounts of Data Requiring Manual Transfer Across Multiple Systems

Sage 300 Construction and Real Estate's inability to integrate with the company's payroll and timekeeping systems required employees to manually transfer data from one system to another. "IT had built us a few tools but nothing talked to each other." Emily recounts. This time-consuming process necessitated an employee solely focused on ensuring the downloading and uploading of invoices functioned properly with each of the company's software systems.

Module System's Reliance on IT Support led to Downtime

During the company's use of Sage 300 CRE, any technical issues experienced on the system required an IT technician to fix the system in person. This forced downtime led to frustrating stopping points in their daily business operations. "If a computer lost power, we had to rely on IT support to get us back on the module system,'' Porter explains.

Difficult to Access System Remotely

In order to remotely access any data located in Sage 300 CRE required logging in to the company's remote desktop. This process of accessing the module was slow and often required maintenance and updates on the system reports. The downfall of using a non-cloud solution was amplified when many employees began working from home during the COVID pandemic.

THE SOLUTION
Sage Intacct Construction + Sockeye

Realizing Sage 300 CRE's inability to serve the needs of their multifaceted construction business, Neil Kelly decided to switch to a cloud accounting software.

Emily stated that for them, "It was a really thoughtful decision based on where we wanted to go." With established/identified systems in place to handle the company's non accounting business operations, they wanted a system that would be used for accounting only.

Neil Kelly ultimately decided to make the switch from Sage 300 CRE to Sage Intacct Construction in January 2021. After choosing the software, the next step was selecting an implementation partner. "[Sockeye] came heavily recommended by Intacct", Porter remembers,"I don't recall shopping for anyone else. They came with a recommendation and it was a great one."

Before Sage Intacct, technical issues required an IT technicion on site, leading to forced downtime and frustrating stopping points in Neil Kelly's daily business operations.

The onboarding process with Sockeye began quickly, and by March 2021, they made the commitment to go live to Sage Intacct Construction.

Immediately, Porter felt like she was "working with real people", and receiving more than just technical support from her implementation team. "The advice and honest conversations established a trust where we could easily make decisions and move forward efficiently."

Learning a new software requires time, and in construction time is money. Emily recounts other implementations where she ran into roadblocks due to the lack of communication among the support team. "With Sockeye, I just felt like I had to explain a process once and the whole team knew it. It didn't matter which member I was working with."

SYSTEM LIMITATIONS: SOLVED

Data Flows Seamlessly Across Multiple Systems

Neil Kelly's keeping of records goes past the distinction of different types of products. The company is accustomed to tracking costs on a granular level, which their payroll and timekeeping systems were not equipped to handle by default.

Sockeye set up custom integrations within Sage Intacct for their systems to handle the level of detail needed for tracking job costs, and ensure the accurate transfer of reporting information from one system to another.

Up-to-date Project Financial Information accessible from anywhere

Configuring an integration with Sage Intacct and Neil Kelly's CRM allows for the delivery of updated client information to be accessed in real time.

The ability for their business users, project managers and heads of department to be able to pull Salesforce data directly from Intacct to view contracts and billing on-site, is something that was not going to be possible to do remotely with their previous system.

"

I don't think I would have survived the Intacct implementation without the Sockeye team.

"

Emily Porter
CFO Neil Kelly

sage Intacct

"My favorite part about Sage Intacct is where we're going with it."

Emily Porter | Neil Kelly CFO

THE OUTCOME

An Intuitive System Designed To Keep Up With Their Construction Business

The team no longer feels restricted in how they can collect and distribute their cost reports like they did with their previous system. Now, Neil Kelly is in full control to set up their data reporting exactly the way they want, and without the need of an IT Team in order to make it happen.

System Automations Resulted in Substantial Time Savings

After the initial resistance from the Neil Kelly team to make the switch, they saw what was a clunky process before in Sage 300 CRE become more intuitive with Sage Intacct. Their CFO adds, "I was probably the most skeptical, but I saw it worked and that it saves my team a lot of time not having to manually merge information from other systems."

This added time can be spent on what Neil Kelly loves - innovation. With the customizations available in Sage Intacct, the accounting team can work to perfect their reporting practices and distribution. "The time spent each day manually uploading invoices into Sage 300 is gone."

Sage Intacct's Seemingly Limitless Integration Opportunities

During the implementation of Sage Intacct Construction, the team saw the system's ability to integrate with their established software systems and the customizations that are possible. With this knowledge, Emily feels that, "Intacct has allowed us to thoughtfully shop for other softwares to do meaningful integrations with in the future".

The ability for the team to plan ahead on what can be accomplished with their accounting system was one of the main reasons they chose Sage Intacct. Neil Kelly finally has found a system that can adapt to fit the needs of their constantly evolving construction business.

ABOUT SOCKEYE

Sockeye is a leading consulting services firm that leverages Sage Intacct to help construction businesses achieve full cohesion and transparency between operations, finance, and accounting.

Contact us today for a demo and see how Sockeye can simplify your accounting ecosystem.

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