



Case Study

Client: Commercial and Industrial Contractor providing piping, boilermaker, and HVAC services

Client Size

(Annual Revenue)

- \$10M to \$50M
- \$50M to \$200M
- \$200M to \$500M
- \$500M to \$1B
- Over \$1B

Problem



The company had purchased an integrated accounting, job cost, and service management software program. They received training on the application but no additional consulting for implementation. By the time Burger Consulting Group was called in, the client and software dealer relationship was strained. The contractor was dissatisfied with all the money they had spent relative to the value they were getting from the system.

Unique Challenges



The company had grown considerably in the last several years and in some respects had outgrown their accounting department. The staff they had was not able to maintain the books for what had become a more sophisticated operation. They were also not accustomed to maintaining such a broad-reaching and well-integrated system.

Unfortunately, the company did not realize that many of their procedures were going to have to change. They also did not realize that users of the system were going to have to be more disciplined in their use of the system. Finally, top management would need to hold managers accountable for results. Without that accountability, no one really needed to look at the information.

Approach



Burger Consulting Group created small teams or identified individuals for each of the functional areas (e.g. Job Cost, Service, Equipment, and Payroll) and assigned them the responsibility for getting their respective applications operable. Burger Consulting Group then documented the desired procedures and workflows and identified the perceived software gaps. Once the situation was diagnosed, Burger Consulting Group contacted the software developer directly and described the situation. Rather than strain relations further with the dealer, Burger Consulting Group thought it best to go directly to the developer and get a fresh perspective. A senior consultant was identified and brought in to work directly with the staff on software issues. An action plan format was developed for each area and was maintained throughout the project.

Resolution



Through additional training and some software reengineering, the staff became much more aware of what it was they had. Each team worked with the software more directly and with the consultant to set up the system properly to meet their requirements. At this point, the company is getting good job cost information and has cleaned up the out-of-balance condition. Some functions continue to struggle because of an unwillingness to change certain procedures or enforce compliance to the established procedures.



Lessons Learned:

- **Companies need more than training to implement complex integrated systems**
- **Management must enforce procedures if a system is to work properly**
- **A company's staff must grow as the company grows if they are to be effective**
- **Broader participation in the implementation of a system is better than just a few people**

