W. SOULE & CO.

W. SOULE TURNS TO CLOUD-BASED SPECTRUM AND SPECTRUM BUSINESS INTELLIGENCE TO MODERNIZE OPERATIONS

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SOULE

W. SOULE & CO. *is a multi-trade industrial contracting firm specializing in process piping, custom metal fabrication, millwright services and HVAC services. The company has been around for more than 70 years, with five locations in Michigan (headquartered in Kalamazoo, Mich.) and one location in Lakeland, Fla. W. Soule's work is primarily in the food/beverage, life sciences, chemical and paper industries. W. Soule operates as a one-stop shop for its industrial customers, providing them with on-time, cost-effective, quality contracting products and services that help its customers achieve their goals. Over the years, W. Soule has developed close bonds with its clients.*

BEFORE

- W. Soule needed to achieve greater organizational efficiency across multiple operations

- Accounting functionality was lacking in areas

- Project managers needed to gain more insight into their projects

- No way to drill deeper into data and achieve construction business intelligence

- Remote access was limited to clunky VPNs

- IT was straining its resources maintaining and updating servers

AFTER

- Achieved rich insight and real-time analysis of projects and financials

- Reduced work and headaches pulling together traditional reports

- Able to streamline accounting and operations functionalities for greater efficiencies

- The company can mitigate risks by spotting trouble spots early on

- Cloud accessibility provides entire organization access to real-time data and decision-making

V | Spectrum®

CHALLENGE

To continue to meet growing demands—and operate six different locations—the company knew it needed to gain better insight into its own operations to achieve efficiency. When the company needed to move from Maxwell Management Suite, it began looking at cloud solutions with more robust functionality, said W. Soule CFO Howard Dembs.

"We looked at Spectrum® Construction Software, which was a referral we got from one of our peer group members that had been using it," Dembs said. "He gave me a demo and when I saw it, I thought, 'this is unbelievably great.' We definitely wanted ACH capabilities. We wanted the simple export features for electronic W-2 reporting that Spectrum had. We wanted better visibility for our project managers."

Dembs also noted that Maxwell's AIA billing was not meeting W. Soule's needs. He saw the accounting functionality in Spectrum — from accounts payable and receivable to job costing to billing — as superior to the company's existing software, while the integrated project management, document management and other functionality made for a more complete construction management software platform. "It was just way, way better," he said.

One of the other big selling points was the cloud. Dembs said the company had struggled with VPNs to try and expand access of its software to users outside the office, while IT costs and things like server maintenance began to drag on the company's time and resources. "When you host [the company's project data] yourself, you've got to make sure you're on the latest servers, then there's all the routine maintenance ... I like the idea of somebody else having to worry about all of that."

With multiple locations and divisions to manage, there was a strong need for a centralized enterprise management solution and detailed, specialized reports to better analyze the data W. Soule compiled from its projects. While true business intelligence tools in construction were still in their infancy, Dembs knew he wanted the data analytic power their features could harness.

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>
> **— Howard Dembs, CFO**

SOLUTION

By choosing Spectrum, Dembs got his business intelligence wish. Not long after the company's move, Spectrum Business Intelligence (BI), was released. Dembs and W. Soule were early adopters — in fact becoming one of the initial beta testers for the solution. Spectrum BI allowed him to create the custom reports he needed, using the latest technologies to significantly simplify the construction data analytics process.

Spectrum Business Intelligence allows users to collect, compile and analyze construction data virtually any way they want to. From in-depth reports, to dashboards, to creative charts, graphs and even geographical mapping of data, Spectrum Business Intelligence provided W. Soule with a powerful data analysis platform. More importantly, it allowed the company to create the reports that were relevant to its operations, in the formats its users wanted to see.

Spectrum Business Intelligence is comprised of a data warehouse and a data analysis platform. An automated process refreshes the data warehouse with current Spectrum construction data, organizing the information into logically organized data cubes. Once the data is aggregated, users like W. Soule can simply select the information they want to see from a host of data buckets, dragging and dropping those data fields into the analytic and report builder canvas.

Dembs and other W. Soule Spectrum users are now able to build much more detailed analysis reports of their projects; they can compare and contrast data over time, division, geographic mapping—virtually any configuration they can think of with interactive reports; they can create intuitive dashboards to give up-to-date snapshots of the organization's financial and operational health, with the ability to instantly drill down into the data for closer analysis; and they can share data analysis and reports with groups, throughout the company easily with smart folder sharing capabilities, or schedule reports and visualizations to be shared with others on a recurring basis.
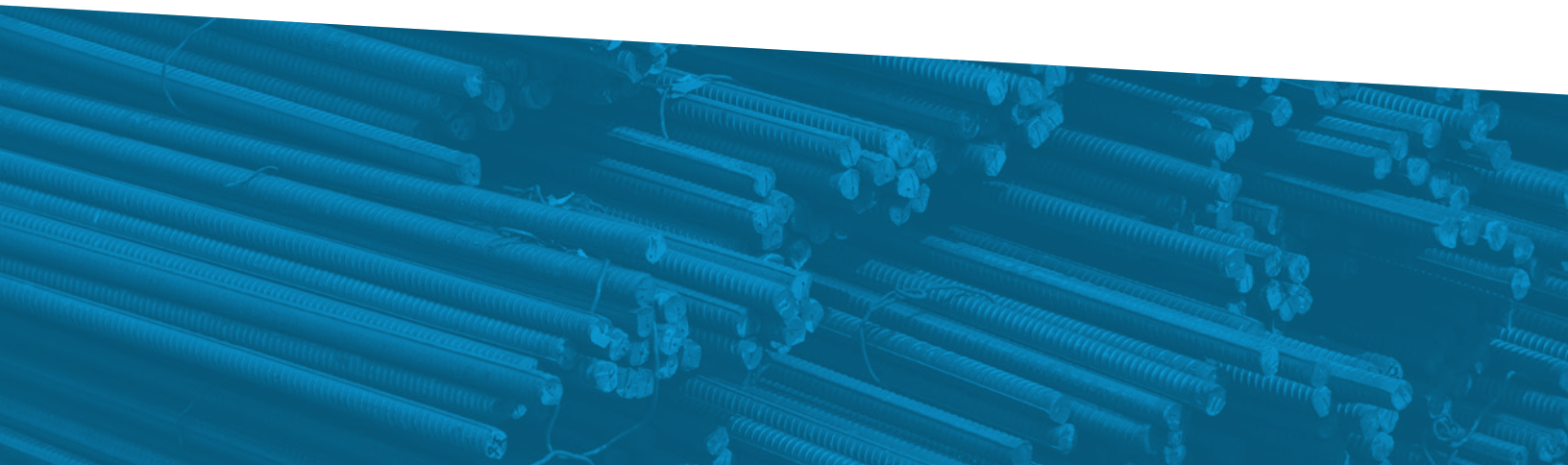
"Spectrum Business Intelligence is very intuitive, and very easy to set up," Dembs said. I was surprised how easy it was to use. This has really been a great tool for us."

Also easier than he had anticipated was the original Spectrum implementation processes. This was due partly to W. Soule's extensive planning to develop a sound technology implementation strategy, and it was partly due to the fact that Viewpoint's Spectrum implementation team worked hand-in-hand with W. Soule from the very beginning to ensure a seamless transition throughout the entire process.

"I would say our implementation went as smoothly as any one that I've ever heard of," Dembs said. "It was very seamless."

Moving to the cloud gave the company immediate access to real-time data, and the power and functionality to act on it. "When you're on the road, being able to pull up information on your phone or on a tablet and make decisions is something we really needed to be able to do," Dembs said.

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Our people have really embraced Spectrum. From a user standpoint, the company loves this software.

— Howard Dembs, CFO
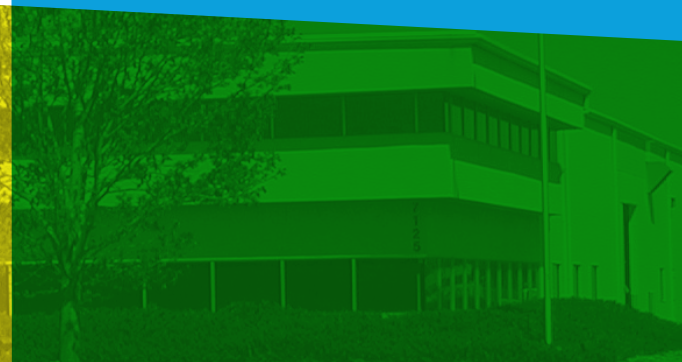
RESULTS

Dembs said Spectrum Business Intelligence provided W. Soule with the power to get the detailed reports and data analysis his company needed that he simply wasn't able to achieve before. And, he added, the process is much simpler and much more flexible to adjustments.

Some of the reports that Dembs said he has created in Spectrum Business Intelligence so far include: customer sales by job number; hours report by customer, job summary by customer; major customer information; and job listings. He sees little limit to the data analytic opportunities with Spectrum Business Intelligence. "I feel it has opened up a whole new world for reporting," he said.

By gaining better insight into data and processes, Dembs said W. Soule has been able to realize key efficiencies throughout the organization—especially within the accounting department. One of the biggest problems W. Soule has been able to get on top of was slow customer payments—many of which were moving to beyond the 90-day mark. That's changing thanks to Spectrum, which Dembs said has made it easier for accounting staff to pull together the data it needs, bill sooner and get paid quicker.

"Access to this information has made the accounting department more efficient and responsive," Dembs said, noting Spectrum's cloud-based functionality has allowed the company to act quicker and work smarter thanks to having real-time data at users' disposal.

And, by utilizing Spectrum's cost centers, W. Soule now has a fluid enterprise management system extending to all of its operations. The real-time sharing and analyzing of data across the entire organization and its projects has given W. Soule the modern tools it needs to gain a competitive edge.

"We're able to get a lot more granular information now," Dembs said. "With the dashboards, we can look at stuff at a glance now, whereas before we really had to work to drill into information and run reports. Our people have really embraced Spectrum, and I don't hear any of the complaints we used to have when we used Maxwell. From a user standpoint, the company loves this software."

RESULT CONT.

Dembs noted that in working closely with the Spectrum development teams during W. Soule's early adoption of Spectrum Business Intelligence, he realized just how significant the end users' feedback was on Spectrum's development — and its functionality and ease of use. "(Spectrum's developers) have been very responsive and very knowledgeable. They care about talking to clients and working with them to solve problems," Dembs said. "We love the hosted solution and other new features we did not have before. It seems like Spectrum is on the forefront of construction accounting software."

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ABOUT VIEWPOINT

Viewpoint, a Trimble Company (NASDAQ: TRMB), is a leading global provider of integrated software solutions for the construction industry. Viewpoint software enables customers to integrate operations across the office, team and field to improve project profitability, enhance productivity, manage risk and effectively collaborate across the broad construction ecosystem. With nearly 8,000 clients, including more than 40 percent of the ENR 400, Viewpoint's innovations are transforming the construction industry by fully integrating operations across financial and HR systems, project management tools and mobile field solutions. For more information, visit: viewpoint.com.

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