Carlson-LaVine Enlists Acumatica Construction Edition to Attract Talent & Build for the Future

CARLSON LaVINE

OVERVIEW

Competing against the biggest names in construction nationally, Carlson-LaVine Inc. carved out a successful strategy leveraging technology and a nimble, lean staff to deliver work of the highest quality in several key segments. But Matt Shamp, executive director, knew that to remain competitive and grow, the construction firm needed to replace its legacy Sage system. Carlson-LaVine deployed Acumatica Construction Edition gaining a powerful, easy-to-use cloud platform that streamlined operations, helped the business grow, and helped employees thrive.

KEY RESULTS

- Acquired an integrated, cloud-based solution, automating processes
- Equipped employees with a modern tool, increasing productivity and gaining an edge in recruiting new staff
- Gained an easy-to-use solution, reducing time to train new employees and speeding adoption by veteran employees
- Cut payroll processing time nearly 100 percent, from 1.5 days to just 10 minutes
- Eliminated extra processing steps, streamlining operations, and saving time
- Improved customer communications, providing more timely information to customers, unions and subcontractors
- Provided a connected platform for continued growth, allowing it to better compete with larger construction firms

CHALLENGE

Carlson-LaVine Inc. is headquartered in Minneapolis, MN, home to some of the largest construction firms in the nation. For years, the business that Thomas Shamp acquired 35 years ago navigated the competitive landscape by becoming experts in healthcare, banking, and grocery construction.

Carlson-LaVine nurtures its employees, equipping them with education, tools and advancement, keys to the company's success. The employee turnover rate is exceptionally low in an industry known for rates averaging 21 percent and acute labor shortages.

The average tenure at Carlson-LaVine is 15 years, says Thomas' son Matt Shamp, a 10-year-veteran himself. And he wants to keep it that way. But to do that, he knows he needs to offer not only competitive salaries but access to the latest technology—technology that makes the company and employees efficient and productive.

"At the rate technology is changing, if your software isn't bringing you along, you've got a real problem," he says. Carlson-LaVine had that problem. For nearly 25 years, they used Sage 300 CRE, which they had to augment with many manual processes.

"It worked, but it never seemed to evolve to the level that brought employees forward," Shamp says. "It basically created more processes and more messes. Everything needed to be exported as PDF and then exported to Excel, which was an easier way to manipulate data." Storing all those files created over 25 years caused additional headaches and required more and more servers.

When Carlson-LaVine added construction project management software Procore a few years ago, Shamp saw how much the new functionality helped his cousin grow as a project manager. "Investing in the right software took him to another level, and bringing people forward is super important to us," Shamp says. "If our employees are well equipped, we're going to be successful."

Recognizing Sage was holding the company back, Shamp researched new business solutions and nearly signed a contract with a provider but decided against it. "I didn't feel good about it; it felt rushed. And we weren't ready," he says.

Company
Carlson-LaVine Inc.
www.carlsonlavine.com

Industry
Construction

Number of Employees
Approx. 45 full time employees

Location
Minneapolis, MN

Products
Acumatica Construction Edition with:
- Procore Integration
- Acumatica Payroll

Customer Social Sharing Details

www.linkedin.com/company/carlson-lavine-inc

www.facebook.com/Carlson-LaVine-Inc-139082642845656

www.youtube.com/user/CarlsonLaVineGC

http://instagram.com/carlsonlavineconstruction

https://twitter.com/CarlsonLaVine

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New Direction after Examining Processes

Shamp regrouped, recognizing the company needed "to look at our processes, and examine what we were doing today that we needed to stop doing."

He hired a consultant, mapped out how Carlson-LaVine operated, and created "a swim lane process of who did what when, which opened our eyes to the things we were doing; showing us that we should never have to do six reports in Sage, and hand type data into an Excel spreadsheet just to get one report."

In process examination after process examination, multiple manual manipulations kept coming up, Shamp says. "We were light-years behind [with Sage 300 CRE]. If we planned to keep on existing—not even an eye for growth—we needed to make a change."

Not only would Carlson-LaVine need to make its staff more efficient, but with such a tenured staff, Shamp knew he'd need modern and user-friendly tools to help attract new employees as veterans retired.

"The look and the feel of Sage 300 was Windows 2000, and we are in 2021 last I knew," Shamp says. "If you work with Procore long enough, everything is big buttons and has a flow and order. It's designed well to carry someone through the entire construction process."

Shamp wanted to give employees "the best tool to succeed." In addition to an easy-to-use modern platform, he wanted something open and flexible, and that easily connected to Procore and other tools. He wanted to work with a company that had a future product roadmap with a proven track record. "It was huge to do what you said you were going to do," he explains.

SOLUTION

During his research for a new platform, Carlson-LaVine reviewed Viewpoint and Sage Intacct, among others. Colleagues recommended Acumatica Cloud ERP, which has a Construction Edition and an open API, allowing it to connect seamlessly to Procore.

Further investigation and demos revealed Acumatica was a strong partner and its platform was easy-to-use, easy-to-scale, and had a unique licensing model based on consumption rather than cost per user. Carlson-LaVine selected Acumatica for those reasons, and because Acumatica listens to its customers, Shamp says.

BENEFITS

Save Time, Less Steps

Acumatica modernizes construction workflows with real-time task views, AIA reporting and billing, compliance management, daily field reports, and certified payroll. With this vast improvement over Sage in system functionality, the Carlson-LaVine team eliminated duplicate processes in areas such as billing, automated other processes, and recouped time employees spent on generating reports. They now spend time on more important tasks, Shamp says. For example, rather than spending a day and a half to produce and complete payroll, "We can be ready for an ACH (Automated Clearing House) in 10 minutes," he says, adding that figure is conservative.

To run a consolidated, substantiated billing report for a particular date range takes just two button clicks, he adds. "Previously that data was in separate systems, so we had to run a cost report in Sage, and then run invoices in Paperless, but the systems were not tied together. We ended up with two separate reports."

As another example, Shamp says, when asked to send information to a union to see which employees have paid their dues, rather than running three reports in Sage, putting data into a spreadsheet, and then summarizing it, Carlson-LaVine runs one report in Acumatica.

"Overall, we're taking a lot less steps to get to the same information," he says.

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Modern Solution Boosts Competitiveness

With Acumatica's unlimited user licensing, Carlson-LaVine's team no longer jockeys for time on the system or waits for access, which happened often with its limited Sage licenses. "It's exciting not to have to shout down the hall to gain access or say someone has to get out (of the system) at noon," Shamp says.

More importantly, Shamp says he now has an easy-to-use tool that helps his team stay competitive and can help them advance. "I don't have the luxury to pay for an internal IT staff," he explains. "I've worn a lot of hats and that means I'm needed a lot. As I became busier, I was less responsive. So, I needed to consider what educational resources were available and how easy it was for people to find information and solve problems on their own."

"I felt like if you picked the right partner and the right ERP with the same mindset, they would bring staff along, which is huge," Shamp continues. "It's an investment in our people. Procore wasn't cheap but it really was an investment in our employees. Sage's roadmap never came to fruition, and that was a frustration because their roadmap was how my employees could advance."

Acumatica offers an extensive library of third-party applications, robust training in its Acumatica University, and a community with more than 10,000 members where users discuss functionality, ask questions and request new features.

Acumatica's ease of use helped veteran employees adopt the new way of working quickly, Shamp says. As a modern tool, the new business solution gives Carlson-LaVine an extra edge when it comes to attracting new talent.

When recruiting "you basically want the best tools in use so that no one leaves and starts their own business," Shamp says. "If we can be the best in the business, then good talent is going to come to us. And if our employees are well-equipped, we're going to be successful."

Equipped to Build for Future Success

Carlson-LaVine now has the construction technology it needs to focus on doing jobs well and making clients happy, says Shamp. "With Acumatica, I'm giving employees an ultra-efficient tool they need to do their jobs correctly and allowing them to do things easier," he says. "I'm handing them a smartphone versus a rotary phone. They are more well-equipped to do their jobs, which produces good outcomes for customers and helps us grow our business."

Shamp highly recommends Acumatica for companies that want to streamline their operations and grow. "Acumatica does what it says it will do, which is a huge deal to Sage 300 CRE customers," he says. "If you are future oriented and want to be more streamlined in your operations, Acumatica is a great partner to work with. With the Acumatica platform, you will bring your people along as opposed to being stagnant or stuck in the past."

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