

JFNew Benefits from an Enterprise System, Deltek Vision, and Service Expertise with SilverEdge

“SilverEdge always has our back. Whenever we are unsure about something, they are there for us.”

– Wendy Loehr
JFNew
Vice President and CFO



JFNew has more than tripled their revenue without adding finance staff while automating and streamlining processes

Industry

Ecological Consulting and Native Landscape Restoration

By The Numbers

- Grew from \$4M a year firm to \$14M without increasing size of finance team
- Surpassed rating goal when surveyed 60 project managers on the quality of internal support
- Automation saved one to two full-time employees
- No need to procure a Human Resource Management system
- Access to proposals sent and contracts signed metrics
- Insight into trends, risk and opportunities used to set strategy
- Employee skills matrix enables experience-specific teams to be built easily
- Client survey ratings are easily accessed

Since 1989, JFNew has been a leading natural resources and ecological consulting firm, providing full service solutions in the areas of wetlands, streams, wildlife and related ecological and cultural resources consulting services. JFNew’s full-service model provides clients with one source for site assessment, design, permitting, native plant material supply, ecological restoration services, monitoring and maintenance. JFNew’s clients benefit from this integrated approach to projects through efficiencies and improved project performance. More than 100 full-time employees in eight Great Lakes State’s offices support clients in meeting their environmental stewardship goals through exceptional local service and the broader resources of the JFNew team.

The Challenge

“We had been using Wind2 for a number of years and we relied on SilverEdge for product support,” reflects Wendy Loehr, JFNew’s Vice President and Chief Financial Officer. When Deltek acquired Wind2, it became clear to Wendy that they would need to migrate to Deltek Vision.

Additionally, JFNew was using a CRM system that had limited functionality. “Our biggest struggle with the CRM system was there was no effective sharing of data between systems. This meant we had to duplicate data entry, which was inefficient and led to keystroke errors,” said Wendy. “We wanted all of our critical back-office data in a single, stable and easily accessible database.”

The Solution

“We formed a team made up of employees from all areas of the company, from accounting and IT to project managers, regional directors and executives – all internal stakeholders,” said Wendy. “Working with SilverEdge, we spent 90 days creating an implementation plan. We saw that Vision could be used in many areas of our company, not just accounting. Vision would definitely be an enterprise system, not just an accounting system.”

SilverEdge recommended a two-step conversion that first would focus on the CRM data, then the accounting and project data. “After converting the CRM data, we had a few months of using Vision for CRM while we worked on the second part of the implementation,” said Wendy. “To acclimate our team to the new accounting functions, we did a test conversion so we could refine the conversion process and ensure our data accuracy. We also engaged in extensive training before the final conversion.”

When JFNew was ready to completely move to Vision, the final conversion was completed and the CRM database merged with the financial database for a unified data set. “Once we made it through our first year-end close with Vision, we didn’t look back,” said Wendy.

Knowing the functionality of the new Vision system, the next step for Wendy and her team was to educate the rest of the company on how Vision could help them be more effective.

“We have taken so many of our processes and automated them in Vision. All of our important information is in one place, not in multiple systems.”

– Wendy Loehr
JFNew
Vice President and CFO

“Previously, our project managers had only used the old Wind2 system for timesheets and expense reports,” said Wendy. They would rely on the finance team to generate and send all project and billing reports. “With Vision, we set up a test company and some simple reports that we thought would be helpful for the project managers to use with their current projects, to train them and gather feedback. After a month, we offered more training for the project managers, gave them greater access, more reports and set up a useful dashboard for them. We offer two opportunities each year for employees to receive refresher training, and we are currently developing recorded webinars to post on our intranet for new employees and those who would like to receive refresher training at their convenience.”

The Results

“Every year we survey our 60+ project managers to see how we, the finance team, are doing as an internal support group for them,” said Wendy. “We are pleased that since we have implemented Vision, our rating has been steadily rising, and this past year we exceeded our rating goal. We have grown and understand so much more how to use Vision from a project management perspective that we are able to provide meaningful information for the project managers who in turn can provide better service to our clients.”

“We measure the number of proposals and signed contracts using a scorecard system,” said Wendy. “This used to be paper-based and we would manage it on spreadsheets by rekeying Wind2 summary data and pulling reports based on the numbers from the spreadsheets.” This was a time-consuming, manual process involving several steps, which delayed having access to the information. “We also required project managers to fill out detailed forms and send them to finance in order to have projects set up in the system. Now our project managers enter contracts and proposals directly into Vision and we can see how we are doing on a day-to-day basis. This allows us to react faster to opportunities. Plus, there is no rekeying of data or keystroke errors.”

“SilverEdge helped us to customize Vision to match the way we do business,” said Loehr. “We have added fields to track information that is

important to us such as client and service type. We have been able to identify trends, risks and opportunities based on the type of clients we are sending proposals to and signing contracts with. For the first time we know how the services we are providing to our various client types are distributed. We review this quarterly with our board of directors and use it to set strategy and refine marketing efforts.”

JFNew also customized Vision to accommodate their human resources data needs. “We are able to track an enormous amount of employee data in Vision – compensation, performance, benefits, experience, awards and skill sets, driver files, hiring and separation data, resumes, memberships and so forth,” said Wendy. “We have built checklists and workflows for most employee-related activities. We still have to maintain some paper files, but Vision has helped reduce what we have to keep and definitely streamlined our systems. We also developed an employee skills matrix, which helps project managers to look across our firm for employee skills and experience to build teams with specific skill sets for client solutions.”

Weekly, JFNew reaches out to clients to survey how they performed on recently completed projects and their executive team reviews the results each week. This process now is automated within Vision. “Again, we used to rely on spreadsheets and manual entry to have access to this information,” said Wendy. “It is now easy to access and everyone is working in the same system. We can see how individual offices and project managers are doing.” JFNew recognizes and rewards the office and project manager with the highest CRM ratings each year.

“In the past 10 years, we have more than tripled the size of our firm to \$14 million in revenue without increasing the size of our finance team,” said Wendy. “We would not have been able to do this without Vision, and would have had to add at least one, possibly two, full-time employees to support our growth.”

“SilverEdge has always been supportive of us and helpful when it comes to finding new ways of doing things,” said Wendy. “Whenever I call someone at SilverEdge, I know they are going to understand my question and help me find an answer. We rely on SilverEdge’s expertise to continue to move us forward.”



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