

Case Study



Background

Howard Ward Associates (HWA) is a family-owned structural and civil engineering business based in Nottingham. Working on projects across a number of sectors including residential, public, industrial and commercial, HWA has achieved a reputation for quality and is ISO9001 accredited.

Problem

HWA worked in much the same way as many small professional services practices; using Outlook for contact management, Sage for accounts and numerous Excel spreadsheets saved on shared network drives for recording project details. This led to a duplication of data and a number of inefficiencies across the business. HWA knew its IT systems were limited and there was a desire to integrate timesheet data to billing processes, prompting the search for a solution. Initially a bespoke system was commissioned, but HWA soon realised the project was too ambitious for the size of the organisation. A period using Tempus Pro linked timesheets to invoicing but integration with Sage was still inefficient.

Solution

HWA understood the pivotal role of IT within the industry and wanted to ensure the choice of software would put it ahead of the game and accommodate all future developments. The search led the business to Union Square for Project Accounting, a project financials system for AEC professionals.

Union Square for Project Accounting captures all fees, invoices, time, expenses and disbursements, alongside forecast and budget information, to give clear visibility of how individual projects are performing. This system is built on strong accounting principles yet is sympathetic to the daily usage needs of financial, professional and technical staff. Data is entered directly into the system without the need for manual re-keying or spreadsheet extrapolation, ensuring you benefit from real-time project performance at any point in time.

Company

Howard Ward

Business

Structural and Civil Engineer

Number of staff

11

Solution

Union Square for Project Accounting

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UNION SQUARE
FOR PROJECT ACCOUNTING

Union Square links HWA's time recording and project accounting functions whilst integrating seamlessly with Sage. The system would introduce HWA to a new, centralised way of working, increasing management visibility and user efficiency.



Implementation

The initial implementation took 4 months, including all of the required preparation work. There was a cut-off point internally for ceasing the use of the old timesheets and the practice quickly became familiar with the new way of working once the benefits were apparent.

Benefits

The installation of Union Square for Project Accounting has helped HWA control project costs and invoicing, manage resources, achieve greater financial controls and reduce administrative effort through direct integration with Sage. Union Square for Project Accounting at HWA has also;

- Reduced the time from invoice to payment by integrating invoicing and debt reporting directly between Union Square and Sage.
- Improved the quality and accuracy of job costing through the introduction of online approvals of timesheets and expenses.
- Standardised project reporting across the office and provided project engineers with "traffic light" feedback and profit warnings.
- Greatly reduced the finance administration requirements for partners at month end, ensuring work in progress is closely monitored and controlled.

A Q&A with **James Ward,** Finance & Business Development Partner

What was the main reason for moving over to Union Square?

After a decade of being frustrated with our IT (non user-friendly interfaces, reports not matching up) and knowing there must be something better out there, we decided enough was enough. Union Square were recommended to us by a local architectural practice we knew.



What challenges did you face along the way?

Time recording software for engineers is not something you can just Google easily so we relied a lot on word of mouth. We were also very aware of the balance to strike between wanting to take a big leap in terms of our IT and not wanting to take on something too ambitious for the size of our business.

What benefits are you receiving from the Project Accounting functionality?

There's a single point of entry for all data and our invoicing process is now automated which saves us from double handling anything. The flexible reporting function means we can access data at any time and we also have an automatic WIP report which is essential for monitoring projects as they progress.

Where are you hoping to go in future?

With the industry as it is we're finding a lot more of our projects are smaller and to do with reporting rather than design. We want to ensure the system follows suit and reflects the changes in our business.

"Union Square for Project Accounting tracks time, expenses and resource allocation in one central web-based system."

Contact us for more information on all our product offerings and how we can help transform your approach.

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Your knowledge. Together.

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