

Your Tech Tamer

Your data. Your way.

When and where you want it.

Customer Testimonial – Jack Barr, CFO, Bancroft Construction

With 125 employees working on more than 100 different projects at any one time, Bancroft Construction relies heavily on its information technology systems to support its teams in the field.

This \$115 million a year commercial and high-end residential construction management firm has turned to **Your Tech Tamer** for more than 10 years to leverage its technology solutions to become more efficient and effective.

The regional contractor first partnered with **Your Tech Tamer** in 2003 when it made the decision to switch from a Newstar (Constellation) software system to Sage Timberline for its accounting function. All of the data that resided in the Newstar system needed to be moved to Timberline. Bancroft needed someone that knew both products well enough to make an easy transition for the company.

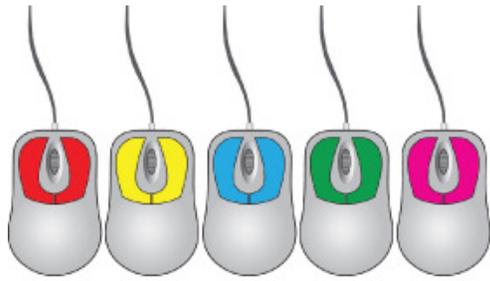
As one might imagine, having in excess of 100 active projects during the conversion, a significant amount of data needed to be transferred. Using manual data entry to transfer the data into the new Timberline system would have taken the staff 2-3 months. Keying in the data would have also caused errors and the verification process would have been time intensive.

Your Tech Tamer developed tables to extract the data and easily import it into Timberline. “This saved us a tremendous amount of time, energy and money,” commented Jack Barr, CFO at Bancroft Construction. “It allowed us to focus on the new software, how it works and what we could get out of it – not on importing data to the new system. This was tremendous for us.”

By transferring the data through the customized tables, **Your Tech Tamer** was able to switch over all the data for the 125 employees in the payroll system and perform the necessary testing over a long weekend, enabling Bancroft to run its payroll in Timberline the following week. Next, **Your Tech Tamer** followed a similar approach with the Job Costing, Purchasing, Accounts Receivable, and Accounts Payable data – smoothly transferring all data to the Timberline system.

“Over the years, we’ve turned to **Your Tech Tamer** for many other smaller projects that are considered out of the box,” explained Barr. “We have changed things to the way we want to operate. **Your Tech Tamer** has been very creative in coming up with solutions.”

One example is the company’s “Blue Sheet”. This document was a paper form (printed on blue paper, thus the name) used to manage requests for changes in employees’ salaries. It provides details on the current salary, a history of any previous salary increases, when previous changes were made, and the amount of each increase. Once a manager completed the handwritten form, it was circulated throughout the office for the appropriate approvals. **Your Tech Tamer** created an electronic form that allows a supervisor to fill out the request online and easily send it to HR. Barr explained that this was a relatively simple process, but the existing system



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couldn't provide the data in the preferred format. **Your Tech Tamer** created a user-friendly form that was really well-received. The final product is even a 'blue paper' screen – allowing Bancroft to continue to use the term "Blue Sheet"!

Your Tech Tamer has also synchronized the data in Bancroft's multiple software solutions (i.e. operations, estimating, project management, HR, and accounting). To eliminate the duplicate data entry with so many different databases and to ensure the data is the same no matter what system it was entered in, **Your Tech Tamer** has written interfaces between the disparate systems. Now, employee data, contact information, wage changes, holiday, vacation, sick time, etc. is automatically updated across all systems. This not only saves the HR and accounting teams time and prevents errors, but it enhances the firm's employee self-service capabilities, enabling employees to check online and see all updated information in one place.

Another project that **Your Tech Tamer** took on simplified an important process for Bancroft Construction and also helped better serve its employees through the creation of an Employee Benefits Statement. This is an annual report sent to each employee at the end of each calendar year that includes their total salary, taxes, medical benefits, vacation and sick time used/remaining, etc. for the year. This statement automatically extracts data from multiple systems to show the employee exactly what they are getting as an employee of Bancroft. And, the HR staff no longer needs to spend hours searching and compiling the data for each employee.

Similar to the benefits data statement, information on vendors could also be found in multiple locations. **Your Tech Tamer** created a Vendor Contacts Database that collects all the essential data about the firm's vendors (i.e. organization, contact name, address, and phone numbers) for three separate software packages and sends it to each database, as appropriate. Before, it was often difficult to find vendor information or keep it in 'sync', especially if vendors were listed slightly different in the various databases. Project managers and accounting would push data back and forth and if the organization name, for example, did not match, there would be issues. Now, it is much easier to manage the data and keep it consistent across the multiple sources.

Barr spoke highly of the **Your Tech Tamer** team, specifically, President, Sandy Clitter. "She has been in the industry, been in the financial end of business and knows technology. She can relate to what and why people are asking for certain data or processes and is often able to provide them with a better perspective. She can talk to both IT and business people in their own languages. She's been great and is a real pleasure to work with."

He added that "if there is a challenging project, I look to Sandy first, even if I know it is a project she wouldn't handle. I always like to get her opinion. She is good at troubleshooting and has a holistic approach to making sure that she looks out for her clients first. Not all consultants do that."