



WinTeam

Coastal Building Maintenance: Using WinTeam to Save 40 Hours a Week

In a few short years, one building services contractor has grown their workforce by 40% and is saving 40 hours a week in overhead resources. How? They implemented an industry-specific enterprise resource planning (ERP) solution from TEAM Software by WorkWave.

A NEED FOR SCALABILITY (AND LESS PAPER)

Coastal Building Maintenance (CBM), a full service janitorial and maintenance company with locations serving areas of Florida and Vermont, provides customized services to meet the unique requirements of each client's contract. With the company's combined reputation and expertise, they've cultivated a client portfolio including office buildings, condominiums, schools and universities, medical facilities, retail, hotels and more.

As the company grew, so did the volume of work needed to deliver on each contract.

"Previously, we'd been using a mixture of different software to manage our accounting needs, but we needed a better way to track things operationally," said Agatha Velez, controller at CBM. "The paper trails across the business were enormous because

everyone had their own systems that didn't interact. Reconciliation was manual and incredibly time consuming.

"We needed a way to manage work tickets, manage our timekeeping and then collect it through to billing and have every step of the process work together. That's when we chose TEAM Software."

CBM found TEAM Software at a BSCAI convention in 2015 and quickly zeroed in on the WinTeam product, an ERP solution which connects financial, operations and workforce management business components in one.

"We put a lot of effort into researching the best software solution to meet our needs," Velez said. "In the end, WinTeam was meant for us. It was built specifically for our industry. It works to connect all the different departments of our industry and establish a single source of truth we can rely on. It came highly recommended by every peer we talked to. In the end, it was a no-brainer choice."

INTEGRATED SOFTWARE + SUPPORT = REAL SAVINGS

On January 1, 2016, CBM implemented WinTeam. The difference, according to Velez, was not only the sheer capabilities the software offered, but the support backing it up.

With the help of TEAM Software’s support team, CBM walked through each step together, evaluating possible ripple effects for different departments as they went. Together, they built a system using WinTeam that would support current operations and could scale as the business grew.

Almost immediately, that work began to have demonstrable improvements on CBM’s processes. A notable example, according to Velez, was the change in accounting processes like purchasing.

“Prior to WinTeam, we’d have to work backwards to bill customers for consumable supplies by contract,” Velez explained. “We’d have to enter a purchase order into our accounting software, collect the orders that were due to be billed, manually enter them into a spreadsheet, then make copies and bill it. Now, we have a purchasing workflow built into WinTeam that streamlines the process and cuts out the manual work.”

The improvement transformed a process that formerly took Velez’s team one to two days to complete into one that took only one to two hours, a savings in single task effort anywhere between 75-94%.

CBM’S GROWTH STORY

Now several years post implementation, CBM continues to see active value from WinTeam, which is used on a daily basis beyond just accounting. Field-based managers use WinTeam features to access accounts, submit orders, review inventory and create action items to manage service issues



on site. If they’re working on an ad hoc job, they can create work tickets on the fly. Using eHub, an add-on self-service portal and mobile app for WinTeam users, they track schedules and service performance. Then, they’re able to integrate that data into all other divisions, from accounting, receivables, payroll and more. Clients can see their billing records and access their own reports, based on configurations and permissions CBM controls.

When looked at business-wide, Velez estimates CBM has saved 40 hours per week just in time savings and productivity — the overhead equivalent of an additional employee — even as the company has grown, increasing employee count by 40% and revenue by 60%.

“We’d recommend WinTeam to anyone in the service business. The capabilities of the software and the support behind it is priceless. We can’t even put a number to the amount of value you provide to our business and how satisfied we are because of it.”



TEAM Software by WorkWave develops market-leading financial, operations and workforce management solutions for contractors with distributed workforces, with a focus on the cleaning and security industries in the North American, Asia-Pacific and EMEA regions. TEAM provides cleaning and security contractors in North America with the only award-winning fully integrated ERP that reduces risk and costs and drives efficiency, profitability and growth. More than 750 companies and nearly 1 million end users rely on TEAM’s solutions globally, with well over 450 companies and half a million end users in North America alone. Founded in 1989, TEAM is headquartered in Omaha, Nebraska. For more information, visit teamssoftware.com.