

Acumatica Helps M3 Technology Group Unify Operations and Grow



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– Kelly Burns, ERP Developer & former Chief Operating Officer

OVERVIEW

M3 Technology Group designs, builds, and installs turnkey audiovisual systems for corporate, higher education, military, and many other vertical markets. When its old accounting system bogged down sales and finance operations, M3 switched to Acumatica for its cloud-based, project accounting and field services expertise.

SITUATION

Founded in 2002, M3 Technology Group's accounting system grew along with the company, from a system fit for a tiny startup to a larger software package that accommodated a growing firm with multiple locations. The Nashville-based company designs, builds, and installs turnkey audiovisual systems for corporate, higher education, military, and many other vertical markets.

Kelly Burns, ERP Developer & former Chief Operating Officer, turned to more robust software packages as the company and its user needs grew, moving from QuickBooks to Sage BusinessVision and then to Everest Software.

Burns began to realize the Everest finance software was starting to hamper the company's growth. Creating quotes for customers was a laborious process that frustrated his sales team. Completing quotes with 20 to 50 line items took nearly half an hour due to the slow search and look-up operations of the software. "We had to know the exact format of the item or name we were searching for. There was no contextual search feature like we have now with Acumatica," he says. Finding historical records was completely frustrating and very time consuming.

Everest was terribly slow when run over a VPN, Burns says. M3 had grown from one location in 2007 to opening branch offices, and when the company went mobile, "it was horrible to connect" to Everest, which was hosted on-premises in Nashville.

When M3 launched new lines of business with different financial needs than its traditional business, Everest couldn't handle project cost accounting. In Everest, those functions "were very minimal and required a lot of manual entry to get where we needed to be," Burns says.

The company needed financial software that could display project-cost profitability in real time instead of waiting until project completion – after time and expense information had been manually calculated and analyzed.

Knowing they needed a cloud-based system to handle the team's mobile office needs, Burns evaluated Oracle NetSuite, Sage, and SAP. After demos, they found the licensing packages were much too expensive since they charged per user, and none would meet M3's needs without even more expense to customize.

COMPANY

- **Location:** Headquartered in Nashville, TN; with operations in Knoxville, Huntsville and Memphis
- **Industry:** Commercial Audio-Visual Systems Integrator
- **Application Replaced:** Everest Software

SOLUTION

- Acumatica Financial Management
- Acumatica Project Accounting
- Acumatica Field Service Management
- Acumatica Customer Management
- Avalara – Sales Tax Automation
- APS Payment Solutions
- Microsoft Power BI

KEY RESULTS

- Maintained substantial revenue growth without adding finance headcount
- Dramatically shortened time needed to create quotes
- Gained a more efficient mobile workforce & field service team
- Eliminated on-premise technology frustration
- Achieved real-time insight to business & technical operations

SOLUTION

M3 Technology needed an ERP solution to track project status, cost, and profitability with project management tools. The company also needed to tie in order processing, shipments, and inventory management with its accounting.

After seeing demonstrations and learning about Acumatica's unlimited user licensing model and deep customization potential (a lot of which can be done without a developer), Burns decided to purchase Acumatica. "It appeared to have everything we wanted and the project accounting we really needed," he says.

BENEFITS

Field Services Fuels M3 Growth

As corporations grow operations nationwide and as higher education institutions expand distance learning programs, the need for managed services with network and video conferencing support has skyrocketed. M3 Technology started offering field support with just a single employee and dispatcher several years ago in cases where phone support failed to resolve a problem.

As the field service offering grew, M3 added more employees and began offering preventative maintenance plans. M3 acquired another small business in 2017, adding 20 new users to Acumatica, while avoiding the costly per-user licensing fees that Acumatica's competitors charge. The Field Services division now contributes about a fourth of the company's revenues.

"Now we have 25 Field Services Reps, five operating as full-time on-site support technicians at universities and corporate campuses," Burns says. "In 2017 we logged nearly 1,300 service tickets, 2018 was double that at least. We use Acumatica's case system and Field Services to track tickets."

Acumatica's Field Service edition allows M3 to streamline dispatching, reduce response times, and minimize costs. It isn't a bolt-on application but rather works directly with the other ERP modules including sales, inventory, purchasing, accounting, and financial reporting. Mobile workers can connect to Acumatica via an app to enter data such as expenses, directly, saving time.

Rather than spending half an hour fighting with freezing applications, the mobile sales team now creates quotes in minutes without any downtime or the latency issues experienced prior to Acumatica.

"M3 Technology has grown dramatically since implementing Acumatica. With the move from the old on-premise solution to Acumatica's Cloud ERP, M3 experienced a growth in revenues by 60% in just the first two years, all while maintaining the same headcount in the finance department. We came out of the gate billing larger orders, but we covered the tasks with the same people. We weren't extra stressed or working overtime to keep up, yet we were doing way more in sales and transactions through Acumatica."

– Kelly Burns, ERP Developer & former Chief Operating Officer

Acumatica Provides Peace of Mind

Previously, with their legacy ERP, the use of notifications was spotty. Operating in Tennessee where the tax structure is three-tiered, Burns configured the software to send out alerts when a new customer was created. The alert notified the credit department and controller so they could create tax-exempt certifications and apply the correct tax to a quote before it went to the customer.

"But it was a daily pain to wonder if the notifications would happen or not," Burns says. "With Acumatica, we don't have to worry. It's rock-solid. The system just works so we don't have to wonder if it's performing correctly." Burns has also easily implemented third party tax software from Avalara, an Acumatica partner, and Microsoft's Power BI, as well as APS Payment Solutions.

Real-Time Insight

As M3 Technology Group upgraded to the latest versions of Acumatica, they were able to gain insight into project expenses on a daily basis. Previously, that information was collected at project completion and then manually entered into a spreadsheet, which provided information only in hindsight.

"Now we can see progressive job profit and loss on a daily basis rather than at the end of a project when it's too late to make adjustments," Burns says.

Acumatica Easy to Use

Burns likes Acumatica's "very clean user interface" and praises the application's user controls, ease of adding new users, its field-level security, along with its superior search capabilities.

"Acumatica's contextual search is effective and very easy to use," Burns says. "I rarely use a menu today. Instead, I just use the main search field and start typing a few characters of the screen I want or the document reference someone has provided in an email... the navigation is crazy good and saves a lot of time and headaches. People may say 'what really? Searching is the best thing?' and I say yeah, it really is."

"Customization within the report designer is fantastic," he adds. "The report designer is also pretty easy for anyone to learn."

Open API's Extend Acumatica

Acumatica's open API interface makes it easy to add third party software and develop customizations, Burns says, which means custom development can be accomplished faster and for less money.

"We outsourced a firm to help us develop a solution that collects several silos of data from different applications and they were very pleased with how easy and clean Acumatica's API is to work with. They said they haven't experienced that very often."

Acumatica: Customer-Focused Company

Even though M3 Technology Group implemented Acumatica several years ago, "We're still scratching the surface," Burns says. With the full implementation of Acumatica's CRM this quarter, Burns continues to roll out additional Acumatica and connected third-party applications to further improve M3 Technology Group's operations.

"I envy businesses starting out on the latest Acumatica versions," he says. "Acumatica is going to really "Wow" them. I can't imagine coming from any other ERP and being dissatisfied with Acumatica."

That statement comes in part, he says, because Acumatica really listens to its users and makes it a priority to add features its customers want.

"They are always trying to advance the product based on user input," Burns says. "They have a great customer community that's open and helpful and really utilizes the suggestion board. I haven't seen that work as well as it does with Acumatica from others who are trying it."

When it comes to customer service, Acumatica is on par with legendary customer experience brands like Apple and Starbucks, Burns says.

"I drink a lot of coffee and love the way I'm treated at Starbucks. It's the same with walking into an Apple store – you almost feel like you walked into Heaven – and everyone wants to help you right away. To me, those are two of the highest customer experiences you can have, and Acumatica is right up there."

Burns says Acumatica has always been very open and honest when an issue might require extra time to resolve and that he's never given false deliverables which he really appreciates.

"It's all about how they listen to you and how quickly Acumatica responds. They really do want to hear from users, understand our business processes and how we use the software so they can begin incorporating new features and enhancements to make things even easier. It's just amazing. We've had no problems at all with Acumatica support, and our partner, Cloud 9 ERP Solutions, who has also gone the extra mile – everyone is truly fantastic."