

Success Story

Airo Mechanical set for success with Sage Intacct

Sage Intacct Construction helps multi-family contractor deliver more accurate job reports and grow business

“We should not be working for the technology; the technology should be working for us.”

Angelia Ryan
Chief Financial Officer, Airo Mechanical



The Challenge

Airo Mechanical knew that to achieve sustainable growth, it needed to improve its back-office efficiency, and its current finance software wasn't cutting it. It needed a solution that could fill in reporting gaps, increase business visibility, and easily integrate with other systems.



The Solution

Sage Intacct Construction is purpose built for construction firms, empowering construction financial professionals to make critical financial decisions, track and manage costs and productivity in real time, from any location. Plus, its open API enables easy integration with other solutions.



The Result

With more transparency and up-to-date data, Sage Intacct Construction has helped Airo Mechanical improve the accuracy of its estimates which has boosted the success rate of its construction projects. Time savings through automation of previously manual tasks has also created more time for better decision making.

- Streamlined and automated previously time-consuming manual processes.
- Project managers now get real-time project spend insights.
- Month-end close reduced by five days via recurring journal entries.
- Improved transparency and oversight of financial reporting.

Sage

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Company
Airo Mechanical
Location
North Carolina, USA
Industry
Construction
Sage Products Sage Intacct

About
Airo Mechanical is a multifamily heating, ventilation, and air conditioning (HVAC) and plumbing contractor based in North Carolina with over 25 years of experience.





Lasting growth requires smart efficient software

Airo Mechanical, a HVAC and plumbing contractor based in Mooresville, North Carolina, found itself in a situation to which many businesses can relate. The company knew that to achieve sustainable growth, they needed to improve their back-office efficiency. This was all too familiar for Angelia Ryan, Chief Financial Officer at Airo Mechanical. At her previous company she turned to Sage Intacct when her teams needed more robust reports and better insights to grow the business.

When she started at Airo Mechanical it was clear that QuickBooks wasn't cutting it. "People get comfortable doing things the way they've always done them but I'm a big proponent of efficiency. I knew that we shouldn't be working this hard in order to get data in or data out of this system," says Angelia.

The company needed a solution that could fill in reporting gaps and increase business visibility. Plus, it was critical that it have deep integrations with the other solutions they were using. Angelia immediately thought of Sage Intacct but now that she was in construction, she needed a solution that included job costing and understood the nuance of construction financial management.

Enter Sage Intacct Construction Sage Intacct Construction is purpose built for construction on the best-in-class Sage Intacct cloud platform. It empowers construction financial professionals to make critical financial decisions, track and manage costs and productivity in real-time, from any location, and reduces typical financial consolidation from 100+ hours down to just minutes. Plus, its open API ensures that Airo Mechanical can easily integrate the other solutions it's using today and may use in the future.

With a qualified worker shortage, supply chain issues, and other project delays, construction businesses are always looking for ways to be more efficient and do more with less. Airo Mechanical is no exception and luckily, leveraging technology has helped the business thrive amidst industry challenges. But as Angelia knows, not all technology is created equal: "We should not be working for the technology; the technology should be working for us. If it's the other way around, we have a problem."



Smart automation streamlines processes and improves decision-making

Fortunately for Airo Mechanical, Sage Intacct Construction has already proven it was the smart choice. The sophisticated software works hard for the contractor, streamlining and automating previously tedious processes. It automatically formats bills in an AIA (annual investment allowance) format, which many Airo Mechanical customers require, and automates retainage as well. And now that the team have dimensions and custom reports set up, they no longer have to rely on Excel. Angelia can run her P&L (by job too if she wants), balance sheet, and cash flow all out of Sage Intacct Construction.

Airo Mechanical staff no longer have to waste time trying to get data in a format that can be easily circulated, which makes reporting a breeze. The company's project managers get an auto-generated weekly report that breaks down their costs in key categories, showing actual spend versus budget and how much they have left to spend in each category. They now have real-time financial insights at their fingertips, anytime, anywhere.

"We didn't have a lot of visibility before into revenue leakage and detailed project performance. Historical data wasn't being captured at a granular level, so we didn't have those data points to compare current performance to," explains Angelia. "Now that project managers are getting this information, they're making better decisions and being more mindful of their budgets."

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“Sage Intacct Construction streamlines processes so with the time you gain back, you can actually look at the data, understand it, and make fact-based decisions, which is the most important aspect.”

Angelia Ryan Chief Financial Officer, Airo Mechanical

Invaluable benefits cement that Sage Intacct Construction was the right choice

The benefits Airo Mechanical has experienced by moving to Sage Intacct Construction are numerous and invaluable. As the company started to gain more insights into job costs, they discovered that their estimates were causing them to start projects off on the wrong foot. With the real-time accurate data from Sage Intacct, they revised their estimating process so that they can now feel confident they're submitting more accurate estimates. The ability to deliver timely and accurate estimates is pivotal in terms of setting up a project and organization for success. Airo Mechanical is grateful for the detailed insights Intacct provides.

Additionally, automating processes and the ability to set recurring AP (accounts payable) and JE's (journal entries) for close has helped Airo Mechanical cut its month-end close by five days. “Sage Intacct Construction streamlines processes so with the time you gain back, you can actually look at the data, understand it, and make fact-based decisions, which is the most important aspect,” adds Angelia.



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Innov8 is a leading provider of business management solutions, including Sage Intacct. We are a Sage Business Partner and Sage Tech Partner (Developer) and have been for over 25 years.

We aim to provide solutions to business problems whilst providing Excellence Through Innovation.

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