

Beltline Electric Company, Inc.



Tags: Construction and Real Estate, Business consulting services, Digital Services

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Beltline Electric Company, Inc. Patrick Bramley, Director of Business Development "We saw that Wipfli could give us a CRM solution we wouldn't outgrow in three years, and that it was already built with contractors in mind, and those two things were huge for us. We're growing our business, and Wipfli has been invaluable in helping us create and automate workflows that will grow our sales pipeline."

Situation

Beltline Electric had outgrown its current CRM. Although Cosential is tailored to the construction industry, it wasn't giving Beltline the reporting, automation, workflows or customization the construction contractor needed.

One of the biggest issues was trying to track opportunities. Beltline had three divisions with all different workflows, and as a result, there was a lot of duplicate entry between systems, communication was stilted and there wasn't good visibility into who was winning bids and why.

Beltline decided to look for a new CRM that could grow with them for years to come. After considering Salesforce and Microsoft Dynamics 365, Beltline selected Wipfli Connect for Contractors, which is a contractor-specific CRM solution built off of Dynamics 365.

"Wipfli had a future-proof solution," said Patrick Bramley, Director of Business Development at Beltline. "They showed us that they could do everything we needed, that they had a solution already built out for contractors but could also customize it to our needs. They spoke our language."

Beltline leaders knew it was important to work with an implementer that had strong experience working with contractors, further solidifying their decision to choose Wipfli.

Strategy

Because Beltline leaders had a firm vision of what they needed in their new CRM, customizing and implementing Wipfli Connect for Contractors was a smooth, straightforward process. The Wipfli team architected the different stages in Beltline's business process flow, from when an opportunity comes in to when it gets closed, to ensure the company gained the workflows, functionality and visibility it needed. The team also gave Beltline advice about different paths to take with customization, letting them know when going a specific direction would close out other functionality options.

To further increase reporting and data visualization capabilities for Beltline, Wipfli also implemented Microsoft Power BI and integrated it with Wipfli Connect for Contractors.

Results

Beltline leaders have been impressed with Wipfli Connect for Contractor's dashboards and Power BI's data visualization. Greater visibility has led to increased motivation among sales employees who are responsible for estimating. They can see how everyone is performing – what bids they're winning and by what amount. They can also see, as individuals, what types of projects they've won in the past and identify what future projects they should pursue. Plus, the business can determine what projects to decline, which further contributes toward higher quality projects and higher gross margins. Wipfli Connect for Contractors and Power BI work together to create valuable visualizations that help Beltline improve overall decision-making.

After the implementation, it became clear to Beltline leaders that the value of data visualization would extend to employees in adjacent departments to sales, leading Beltline to purchase additional licenses for Dynamics 365 and Power BI.

"We wanted to make the technology available and visually palatable so no matter what your role is, you can look at the data and understand who's responsible for what, how much bidding is happening in each division and how you can help drive profitability," said Patrick.

Going forward, Beltline's goal is to consolidate its data sources and further integrate Wipfli Connect for Contractors with their core accounting system, Viewpoint, and Microsoft solutions such as Teams, SharePoint and Power Automate. The company is continuing to work with Wipfli to improve these systems and integrations and to determine the best ways to use its data – making sure it puts information at the fingertips of those who need it to make better, faster business decisions.

Client profile

Beltline Electric has been providing electrical construction services throughout the southeastern United States since 1957. Beltline provides a variety of electrical construction services for large industrial projects to commercial service calls in the following industries: power generation, chemical processing, manufacturing, healthcare, food and beverage processing, hospitality, data center, government and education.

Relationship Executive(s)

Ryan C. Rademann, Senior Manager

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