

Safety Management Group Seamlessly Transitions to Remote Work

“I cannot fathom that we could've picked up in a day and be remote without Acumatica. I shudder to think about the amount of time and coordination it would have taken with our prior system.

– Rebecca Ogle, CFO”

OVERVIEW

Safety Management Group gained a stable foundation for their business thanks to its implementation of cloud-based Acumatica. While many of the company's staff continue with day-to-day business operations via their traveling office and smartphone, Safety Management's finance and other office staff were able to make the shift to working virtually overnight. In addition, Managers gained real-time access to information previously unavailable.

WORK FROM ANYWHERE

Safety Management Group offers safety consulting services and training nationwide to construction firms, utilities and healthcare facilities through more than 200 associates who travel to job sites and work from mobile devices, such as their phones. Executive and finance operational support comes from its central Indianapolis headquarters. When the finance and operations team needed to work from home due to the COVID-19 outbreak, the shift was “Miraculously easy,” says Rebecca Ogle, CFO. “In a day's time we confirmed everyone had what they needed, they took their office work home that night, and started working from home the next day.”

REAL-TIME BUSINESS INSIGHTS

Using the Acumatica mobile app, Safety Management Group managers log in and “See what they need to at a level of detail they never had before across all the areas of the business,” Ogle says. They can now see actionable data such as timecards and expense claims that need approval, direct reports' billable hours, and whether clients have paid a bill or not.

SMG consolidated 7 different applications into one with Acumatica, says CEO Randy Giesekeing. He and other executives now use Acumatica dashboards to monitor critical financial data in real-time. Previously, executives would contact Ogle, who then had to hunt for the information in seven applications, analyze it, and create a report to be shared.

“We have a workforce hungry for KPIs and metrics and Acumatica provides that data,” she adds. “They can generate a report and look at profitability at the click of a button. Acumatica now serves as the single source of truth for our business ensuring we are making the right decisions during this time.”

BOOST PRODUCTIVITY

Safety Management Group is more efficient and operates more cost effectively thanks to Acumatica.

Ogle estimates Acumatica's dashboards and the ability to operate from a single source of data freed up some 12 weeks of her time a year. Consolidating time and expense reporting into a single source of data saved the 5-person staff several hours and allowed them to avoid hiring an additional person. The team is working to convert spreadsheet based calculations into Acumatica's Project Quotes to allow them to estimate and bid work more efficiently.

Because Acumatica easily connects to third party applications including Paylocity, the company reduced the time it takes to process payroll from 40 hours to 10 hours. Acumatica made it easier for the company to onboard additional associates; this year they added more than 30 to the team.



COMPANY

- **Location:** United States, Headquarters in Indianapolis, IN
- **Industry:** Professional Services | Consulting

NO. OF EMPLOYEES

- Approx. 225 full time employees

PRODUCTS IN USE

- Acumatica Advanced Financials with Project Accounting, Customer Management

CUSTOMER SOCIAL SHARING DETAILS



LinkedIn



Facebook



SoundCloud

PARTNER DETAILS

Somerset
CLOUD

SomersetCloud, Indianapolis, IN

“With Acumatica located in the cloud, it literally is no different sitting here at home or in my office chair, and it's like that for my team. The functionality is the same, everyone is productive, and that's a huge relief.

– Rebecca Ogle, CFO”