

WALZ GROUP CREATES SEAMLESS FINANCIAL PROCESSES WITH MOVE TO THE CLOUD

Trimble Viewpoint Case Study

Like their counterparts around the world, Australian construction companies face tougher challenges than ever in a harshly competitive environment that's chronically short on skilled workers, reasonably priced and reliably accessible materials, and – most elusive of all – the right information to run their businesses.

Walz Group has risen to these challenges better than most. A Trimble Viewpoint customer since 2020, the independently owned infrastructure services provider employs about 280 people and recently opened a second workshop to support its growing specialty contracting and maintenance services business.

Walz Group serves energy, mining, resources and other industrial infrastructure customers primarily in the Gladstone region and throughout the Bowen Basin, says Kate Brazier, the company's financial controller. Brazier reports to the CEO and leads Walz Group's finance team. She joined the company in 2016 as a senior accountant and moved into her current role in early 2020.

It was to be an eventful year. Despite the COVID-19 pandemic, Brazier and other company leaders decided that they needed to move forward with a project to transform how the group managed its resources, projects and people. Walz Group would transition from scattered spreadsheets and aging point-solution software to a cloud-based and continually enhanced suite of connected solutions: Vista ERP.

Success brings challenges

While the company founded in 1976 by Colin Walz had grown steadily over the years, it was running into the challenge that all successful construction firms eventually face: how to scale operations to support a growing business, all whilst staying profitable.

Walz Group's reputation for dedicated people, quality work and a safety program second to none now needed to be matched by an equally strong set of technology solutions to bring its financial, HR and field management into the twenty-first century.

As always, the key challenge confronting the company was managing labor – from hiring and onboarding to deploying new employees and managing payroll.

"Labor is our primary issue, especially for us being somewhat more project-based," Brazier says. To service customer facilities during a typical short, labor-intensive maintenance shutdown, for example, Walz Group needs to hire anywhere up to 100 people quickly. Going after such projects requires confidence in the company's ability to do so efficiently and effectively – in other words: profitably.

Fortunately, the company is known for retaining and developing talented people, and about a third of its full-time employees have been with the company for more than 10 years. Brazier says. "We respect our employees, we're very focused on their safety and overall well-being, and when we find people with the same values, we do our best to retain them."

Relationships with customers have been just as important to the company's success. Centered in the Gladstone area since the beginning, "we have many long-term customers in the region who really value our safety culture. I think that's something we're known for, our high safety standards."

Enough is enough

Quality work done by quality people led to steady growth. But by early 2020, the back office was struggling to keep up. "Finance, HR and project management were all maintained separately," Brazier says.

"We had three separate financial, time sheeting and payroll systems. From a tracking and reporting point of view, it was very time-consuming and disjointed. Job numbers were different across systems. The project teams would refer to job numbers one way, whereas finance would refer to them in another way. It was just confusing, with no continuity."

At the center of the maelstrom was the legacy ERP. "It was too big and clunky for us and it was not construction-specific. Also another

pain point for us was our reporting. We really, really lacked in the reporting and it was very manual. We required multiple spreadsheets," Brazier says. "All of those things combined, there were a few unhappy people in the business and it got to the point where we were agreed, 'It's time to have a look at this.'"

Finding the right partner

A few senior leaders at the company suggested taking a look at Trimble Viewpoint's offerings. "We had our criteria sheet with our needs and our wants, and then from there we met with a few providers and evaluated who essentially ticked the most boxes," Brazier recalls. "Not just looking at today, but also having a look at where we could go, from a business perspective: 'Where can this system take us? Does it suit us now, but can it grow with us as well?' That was sort of the key.

Obviously, the future is unknown, but we didn't want to go down the path of implementing software that potentially down the track was going to be no good for us."

A 'fantastic' implementation

Walz Group pulled the trigger in early April 2020. "Our goal was to go live before 1 July, our financial year being July to June," Brazier says. With the pandemic raging, "we were going to have a purely off-site implementation. We had no physical meetings, even our go-live was carried out remotely."

With many implementations, consultants or vendor personnel typically are onsite for several weeks, but "we did that all remotely with no showstoppers on go-live."

Walz Group officially went live with Vista on Monday the 28th of June. "We run a weekly payroll, so we went from the old payroll one week, to Vista payroll the next week. That really was a significant achievement," Brazier says.

"Our implementation story is fantastic. I think what we were able to achieve remotely, in a short period of time, during a pandemic, is a large credit to the efforts of both parties."

Now we have the time and ability to review and analyse things like rates, overtime, allowances, etc. more closely.

Kate Brazier,
Walz Group
Financial Controller

Running faster and better

The benefits quickly became apparent. For a start, hands-on payroll time has been reduced significantly. "We had a manual timesheet module that had to be reviewed and then transferred into our payroll system, and then it was again reviewed and checked in the second system. The ability to do all of the above in one system was game-changing for our payroll officer," Brazier says.

Employee set-up is also faster and easier.

"If we have an influx of say 50 people for a project, we don't notice that impacting us as much as what we had in the previous system; from an employee set-up point of view and then timesheet entry and processing of pays."

That's made life better for everyone. "It's given the team members the ability to focus on reviewing payroll rather than the data entry. Previously, our time would be spent on data entry and with a weekly payroll, you're on a deadline and focused on getting it processed, whereas now we have the time and ability to review and analyse things like rates, overtime, allowances, etc. more closely," Brazier says. "It's the same with accounts payable. It's quite straight forward to enter an invoice into Vista, so it gives us more time to review and be sure we're processing invoices free from errors. It's allowed us to slightly shift team members away from data-entry and towards reviewing."

Benefits of the cloud

Moving from local servers to the Trimble Construction Cloud has also enabled Walz Group to run a better business. "Prior to Vista, our purchase orders were all manually signed," Brazier says. "They were printed out, and then manually signed and scanned back in. And obviously with Vista, that's now all online."



Viewpoint Vista with Financial Controls allows Walz Group's project managers to approve purchase orders and invoices on their phones, tablets or desktops. "That's been a bit of a game changer for us, the time that's saving," Brazier says. Likewise, it eliminates the administrative burden of "printing, scanning, emailing. It's all just in the system. And it's easily traceable for us as well."

Walz Group now wonders how it ever did things differently. "I would say the biggest thing for us in the cloud is the ability to access our data – be it working remotely at home, working remotely on site or working in the office – the ease of access by having it in the cloud is fantastic," Brazier says. "From our point of view, being on the cloud is smooth. It's accessible".

Focusing on the right things

Such accessibility has not only saved time in the office, but it's also freed up Walz Group's project managers and executives to more efficiently, and effectively, serve their customers. "It's definitely allowed us to become more efficient, as it's enabled us to work faster, from anywhere," Brazier says.

"Our Project Managers would previously have to wait for a purchase order to be raised and emailed, go back to the site office, print it out to manually sign for approval, and then scan and email back for processing".

"Now, once a purchase order is raised, they jump on their phone, click approve and it's

underway. It allows them to focus on the project and the task at hand."

That flexibility extends all the way up the company ladder. "Senior Management are frequently offsite at meetings or site visits," Brazier says. "So when they're in a taxi on the way to/from a meeting or sitting in an airport lounge, they can approve a purchase order or an invoice, and allow the wheels to keep turning in the process, where they may have been held up before."

'They were there to support us'

After a few years running Viewpoint Vista with Financial Controls, Walz Group appreciates not only the functionality, but the customisability and flexibility in reporting. Most of all, perhaps, Walz Group appreciates Viewpoint's partnership approach.

"I think from the beginning it was clear from our interactions that they were there to support us," Brazier says. "And it definitely seems as though Viewpoint are putting a lot of time and money into improving and constantly growing their products – trying to make the system better and listening to their customers."



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