Hill & Wilkinson Stay on Top of Activity and Accuracy with Cosential-Vista Solution

For nearly a half century, Hill & Wilkinson has steadily grown from a small general contracting firm to an ENR 400 industry leader. The company's staff of more than 250 construction professionals delivers services including preconstruction, virtual design and construction, integrated product delivery, design-build, construction management, and facility commissioning.

Hill & Wilkinson relies on Vista by Viewpoint™, as its ERP solution, integrated with Cosential, delivering comprehensive CRM and proposal automation for Architecture, Engineering, and Construction firms. Courtney Kearney, CRM Manager at Hill & Wilkinson, says, "Having this integrated solution is so valuable. We use the Viewpoint Financial Data Connector to bring over crucial, time-sensitive data from Vista, including start and completion dates, dollars, percent complete, and subcontractors. I don't have to hunt people down anymore or worry about the information being accurate and current. It saves me and my colleagues hours every week and removes the inefficiency of double-data entry."

Prior, the contractor was using a Sage CRM product and according to Courtney, it "was so complicated that only one person was using it. We wanted something more user-friendly and not so cumbersome."

Automating Workflows

Hill & Wilkinson was eager to explore the many capabilities of Cosential once the team started seeing initial benefits. "We first focused on the opportunity side of things to benefit marketing and business development. Once things were settled and established with those departments, we expanded our use to the estimating and preconstruction side," explains Courtney. "Next, we started leveraging the integration with Vista for automating processes. We are able to use the workflows to trigger processes and prompt people to take specific actions, such as project completion photography, project close out reports, and other date-driven items."

These triggers have also helped Hill & Wilkinson close the gap between when a project is won and when it gets created in Vista. According to Courtney, "Now when a job is won, a trigger in Cosential sends an email to IT and accounting; all involved realize the job will be started in Vista soon and we can stay on top of the project managers to get the information needed in the system. Prior, there was a gap between the marketing/sales side and the operations side, which would lead to confusion or people being unaware of jobs we'd won and create other problems."

CUSTOMER OVERVIEW

Contractor Type:
General Contractor

Headquarters:
Richardson, TX

Employees:
250+

Annual Revenue:
$437M

Viewpoint Customer:
Since 2012

HILL & WILKINSON
GENERAL CONTRACTORS

www.hwgc.com

"Having this integrated solution is so valuable. It saves me and my colleagues hours every week and removes the inefficiency of double-data entry."

Courtney Kearney,
CRM Manager,
Hill & Wilkinson Construction

VIEWPOINT®
A TRIMBLE COMPANY

COSENTIAL ®

Courtney offers another accounting improvement, explaining: "We used to struggle with company registrations and licenses in different states, when they expire, what numbers, who's keeping track of them, and so on. Now we have workflows that trigger actions, so our executive admin can take care of renewing and staying on top of it. This is very easy with the Vista-Cosential workflows."

Completion Reports and AIA

The contractor has also experienced significant time-savings specifically related to completion reports. These close out documents were previously entered into Cosential manually, but now the data is brought in directly from Vista and just needs to be verified. "We do on average about five completion reports per month, and this new method saves us easily two hours on each report," says Courtney. "Plus, it's amazing to have all our in-progress and completed work in the system so we can complete the AIA A305 3.4 and 3.5 at the click of a button. Using the Cosential-Vista solution overhauled and improved the process it took to complete the AIA A305 which we run all the time."