

A Case Study in Building an Integrated ERP Foundation

How Reach helped a construction company move from fragmented tools to a connected Acumatica platform

Industry	Construction
Platform	Acumatica ERP
Engagement length	Six to twelve months, phased rollout
Reach team size	Four to five people

Engagement Overview

Reach worked with a construction company that was operating across a fragmented set of tools, including QuickBooks, Excel, ACC, AcuLoan, payroll software, Tenna, and a range of manual processes. Rather than replacing every existing application, the goal of the engagement was to establish Acumatica as the core ERP platform, move the right functionality into it, and build a more connected technology environment around it.

The implementation covered financials, construction and project accounting, accounts payable and receivable, the general ledger, subcontracts, equipment management, approvals, and reporting, with an integrated data warehouse in progress to connect Acumatica with the systems that still serve a useful purpose outside the ERP.

The engagement ran roughly six to twelve months from kickoff to go live, delivered as a phased rollout rather than a single cutover. The team started with financials and construction while catching up several months of financial activity, so processing could reach a current, real time state. Customizations, integrations, and data warehouse work were introduced gradually as the core implementation matured.

On the Reach side, the team included about four to five people: a project lead, three consultants, and dedicated development and data integration expertise, with some team members contributing across more than one of those areas depending on what a given task required.

Understanding the Client's Needs

When Reach first engaged with the client, the central issue was fragmentation. Work was spread across multiple applications and spreadsheets, which created duplicate effort, manual data entry, manual scraping and importing of information, slow processing, limited visibility, and a real risk that information could be missed. Accounts payable was a clear example of this: bills and payment terms could be missed or were hard to track consistently, and credit card processing relied heavily on Excel and manual imports.

Before Acumatica, different parts of the business lived in QuickBooks, Excel, ACC, AcuLoan, Tenna, payroll software, and other tools, with information often moved between them by hand. Excel in particular carried a lot of weight for things like credit card tracking, reporting, and other operational data.

To scope the project, Reach reviewed the client's existing applications, spreadsheets, reports, and workflows and compared them against what Acumatica offers out of the box. That comparison became an implementation list, which the team worked through in regular meetings with the people who actually owned each business process, so requirements were validated directly with the right stakeholders.

The biggest surprise was not a hidden technical problem but the sheer number of things the organization wanted to improve at once. There were many requests for personalization, process change, and custom functionality, and the team had to continually organize those requests into manageable phases rather than attempting everything simultaneously. Getting financial processing current enough to close accounting periods quickly remained an important priority throughout.

Approach and Strategy

Because job cost and project information are closely tied to the financial system in a construction business, Reach established financials and construction as the foundation of the implementation before layering additional functionality on top. The initial focus areas were accounts payable, accounts receivable, the general ledger, projects and job cost, and subcontracts, since together these created the core financial and project management foundation the rest of the work would build on.

Two areas required meaningful customization: approvals and equipment management. The broader integration strategy also includes a data warehouse designed to connect Acumatica with systems that remain outside the ERP, so the client can keep specialized applications where they make sense while still making that information available across the wider Acumatica environment.

Reach prioritized work by operational importance. Getting financials and construction functioning correctly, bringing transactions current, and enabling period close came first, and new requests were

weighed against those existing priorities rather than added to the implementation automatically. The project broadly followed a standard Acumatica implementation methodology, adapted by the consulting team based on experience and on what came up along the way, so the process stayed structured without becoming rigid.

Delivering Through Complexity

The hardest part of the engagement was preventing it from trying to accomplish too much at once. Many of the client's ideas and requests were legitimate, but successful delivery depended on controlling scope, sequencing improvements deliberately, and keeping the organization focused on its highest priority processes.

One recurring technical challenge was the limitation of the standard Acumatica interface when the client wanted more specialized workflows. Depending on the specific requirement, Reach addressed this through configuration, custom development, or by adapting the process itself to meet the business objective without adding unnecessary complexity.

Change management was also a real factor. Some users were understandably attached to familiar tools like QuickBooks and Excel, and Acumatica changed daily processes significantly, in some cases rebuilding them almost from the ground up. Reach addressed this through regular communication, hands on training, and working directly with users as each new process was introduced. As people became more familiar with the system and saw the improvements it brought, confidence in Acumatica grew.

Requirements continued to evolve throughout the engagement, and additional customizations were identified along the way, which meant scope and priorities needed regular adjustment. Keeping the project on track came down to communication and a willingness to reassign priority: whenever a new requirement surfaced, the team discussed its importance with the client and explicitly decided what should move up or down in priority, rather than treating every new request as an immediate must have.

Working With the Client Team

The engagement involved frequent contact with the client's team, typically two to three meetings a week during active implementation. Early meetings focused heavily on requirements, later ones moved toward templates and configured processes, and eventually toward training and operating procedures, with weekly discussions used throughout to review progress and priorities.

Training was practical and tied closely to real work. Reach held formal sessions covering the standard Acumatica processes each group of users needed for their role, and also worked directly with users on

the actual tasks they had to perform whenever new functionality was introduced. That made knowledge transfer part of the implementation itself, rather than something saved for the end.

The client's Financial Director was the main operational contact on the client side and played an important role coordinating requirements and priorities, often based on operational needs and requests coming from the company's owners. Other employees contributed as subject matter experts whenever their area of the business was being addressed. Throughout the engagement, Reach and the client held regular meetings and reviewed priorities on roughly a weekly basis to keep expectations aligned.

Results and Impact

Since go live, the client has seen improvements across a number of areas: faster processing, stronger visibility into projects and job cost, fewer missed accounts payable bills, a smoother period close process, better approvals, less reliance on Excel and manual imports, and information that is more centralized overall.

Reach did not set up formal before and after measurements on this engagement, so it would not be accurate to claim a specific percentage or number of hours saved. That said, the operational impact has been consistently positive, particularly in how much effort it now takes to complete everyday processes and how easily people can find the information they need.

Day to day operations changed significantly. Some processes were redesigned almost from the ground up, which is often necessary when moving from a set of disconnected tools into one integrated ERP platform. That required an adjustment period for users, but the result has been more structured processes and less time spent getting through many everyday tasks. Feedback since the project wrapped up has been positive, and the client has been happy with the improvements and the new capabilities Acumatica brought to its operations.

The client now runs financials, construction and project accounting, subcontracts, approvals, and equipment related processes around a single Acumatica platform, rather than depending mainly on disconnected applications and spreadsheets. The data warehouse strategy still in progress will extend this further, bringing information from specialized outside systems into the same connected environment.

Lessons Learned

Looking back, the experience of the consulting team was the single biggest factor in the project's success. Recognizing priorities, controlling scope, adapting the approach as needed, and keeping the project moving through changing requirements were what kept the engagement on track.

If Reach were to do this again, the team would set even stronger expectations up front about limiting changes during active implementation phases. New requirements are inevitable in a project like this, but communicating their impact on priorities, scope, and delivery earlier and more explicitly would make the process even more efficient.

The engagement reinforced a broader lesson Reach now applies to other construction clients: requirements need to be transparent and precise from the start. Construction ERP implementations involve a large number of interconnected operational details, and understanding those details early makes it easier to design the right processes and reduces the amount of change needed later in the project.

For any consultant taking on a similar project, the advice is simple: pay close attention to the details. Construction processes can look straightforward at a high level, but the success of the implementation usually comes down to smaller operational requirements and how they interact across accounting, projects, subcontracts, approvals, equipment, and reporting.

Closing Thoughts

The team is most proud of delivering this implementation despite the understandable anxiety that comes with changing so many established processes, and of earning the client's trust in Acumatica along the way. As one member of the team put it, summing up the engagement in a single sentence:

"The biggest success was turning a team that was initially anxious about moving away from familiar tools into a team that trusts Acumatica and sees the value it brings."

Prepared by Reach. Client details have been generalized in this case study.