



## McStain Neighborhoods Packs up Inefficiencies and Makes the Move to Improved Profitability

### The Challenge

McStain's growth was outpacing QuickBooks, and it needed to integrate back office accounting data to its BuildTopia homebuilding software and replace manually-driven processes.

### Solution

McStain worked with Velosio to assess business processes, uncover opportunities to gain efficiencies, and selected Microsoft Dynamics SL integrated with BuildTopia, to gain better control over their data.

### Results

- Developed a Power BI template for project accounting
- More easily making informed business decisions with intelligent data
- Better able to define customer profitability and building cost  
Reduced redundant data entry
- Intercompany abilities have added efficiency to accounting staff
- Improved reporting
- Ability to manage growth goals of 500%+
- Cut month-end closing time by 25%+

### Client Overview



**INDUSTRY:** Construction and Homebuilding

**LOCATION:** Denver, Colorado

**NUMBER OF LOCATIONS:** Two

**SYSTEM:** Microsoft Dynamics SL

McStain Neighborhoods is a sustainable homebuilder headquartered in Denver, Colorado. McStain understands that the energy you use in your home can harm the environment, deplete critical energy sources and cost you money! Sustainable McStain homes can save its customers more than 30% on utility bills, while remaining mindful of the environment.



## Supporting Growth

McStain Neighborhoods was using QuickBooks for accounting functionality, and quickly outgrew its capacity. The team at McStain spent considerable time with a consultant to review its workflows, processes and pain points. McStain also considered alternative construction management solutions which would also encompass accounting functionality, but in the end determined that keeping BuildTopia for construction management and replacing QuickBooks with Microsoft Dynamics would be the most cost-effective, efficient path. The consultant referred McStain to Velosio.

## Microsoft Dynamics SL

Selecting Microsoft Dynamics SL was a quick decision for McStain. After Velosio demonstrated the capabilities of Microsoft Dynamics SL, as well as the integration with BuildTopia to McStain on a Friday, the team requested the paperwork to sign the deal on the following Monday. "One of our initial concerns with switching systems was price versus cost," says McStain COO David Spahr. "The initial expense was considerable but the cost to McStain for not making the move was greater."

Velosio began the implementation and go-live was just four months later. "Our then CFO had previous experience with Dynamics so familiarity with the system was not an issue, but it was an all hands-on deck event," says Spahr. "Preparing historical data for conversion was time consuming. The greatest fear was picking the date to convert and committing to that date...this

was no easy task. As a small company we rarely are faced with wholesale technology changes. This was a big step, but it has moved us in the right direction," continues Spahr. After go-live, Velosio completed training on-site for the McStain team, with a goal to "train-the-trainer" so that additional new staff could be quickly brought up to speed.

## Power BI

To fulfill reporting needs, McStain turned to Power BI to analyze data specific to project accounting. "Power BI is a dynamic product, and the best thing about it is that once the desired dashboards have been created, it's just about adding data to existing reports and hitting the refresh button," says JC Rose, controller for McStain. "In our monthly staff meeting I'm now able to present data in a much more visual format that enables us to make better business decisions. I am looking forward to learning more about the program as we have only scratched the surface of its capabilities."

## System Benefits

The McStain team first experienced benefits in accounting. "With Dynamics, we are much more efficient," says Rose. "Intercompany is especially beneficial to us as we work with general contractors on a lot of different projects. Reporting is much better as well. Dynamics is a much faster system than QuickBooks. We can very efficiently go in and out of multiple companies, whereas with QuickBooks we had to login and logout of every company one by one.



We can manage as many projects as we need, and still be very efficient. The goal at McStain is to grow over 500% over the next few years, and we are confident Dynamics can manage this amount of growth, and we won't need to add more accounting employees," continues Rose.

"It's a good system," says Rose. "I would recommend it. The reporting is really, really good. Our CFO and Financial Analyst both get all of the data they need out of the system. Journal entries used to be a huge task, and now we can just copy and paste them in from project to project and it saves so much time. Dynamics has cut our month-end closing time down by a minimum of 25%, maybe more," continues Rose.

## Velosio Support

McStain has also been pleased with the support they receive from Velosio. "With Velosio, we get all of the support that we need for the system," says Rose. "When we email them, they are on it right away, and are very helpful. They have been helpful regarding Crystal Reports and Management Reporter as well."

## BuildTopia Integration

"The integration between BuildTopia and Dynamics is working just fine," says Rose. "As long as we build a project in BuildTopia correctly, it integrates well to Dynamics." With integrated accounting, sales, marketing, and construction management information, McStain now has a better understanding of which community plans are most profitable.

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Controller, McStain

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