INDUSTRY
CASE
STUDY

CONSTRUCTION & MULTI-DIVISION CONTRACTING

THE
Challenge

A construction company operating across residential, commercial, roofing, and glass divisions, lacked clear financial visibility across the organization.

Each division operated its own QuickBooks file, meaning this company's financial data was spread across multiple disconnected systems. This made it difficult to see how the company was performing as a whole.

The company was considering hiring an additional finance employee simply to assemble reports and gain insight into operations. They needed a way to connect their data and gain real-time visibility across the business.

What they didn't realize was that critical financial opportunities were hidden inside their disconnected systems, ultimately revealing nearly $860,000 in overlooked revenue and funding.

OUR

Solution

As the company's **Managed Intelligence Provider (MIP)**, Simpatico connected its financial and operational data into a unified reporting environment.

DISCOVERY & DESIGN
Simpatico worked with leadership to understand how financial data was being tracked across divisions and where reporting gaps existed.

Key data sources included:
- Multiple QuickBooks files
- Project tracking spreadsheets
- Separate reporting processes across business units

AUTOMATION & INTEGRATION
- Simpatico implemented a system that connected financial data across the organization and created clear visual dashboards.
- Key capabilities included:
- Integrating multiple QuickBooks systems
- Connecting project tracking spreadsheets
- Creating real-time reporting dashboards
- Providing unified visibility across all business units

BUSINESS ALIGNMENT
The new system helped leadership better understand company performance, reduce manual reporting, and identify financial opportunities across the business.
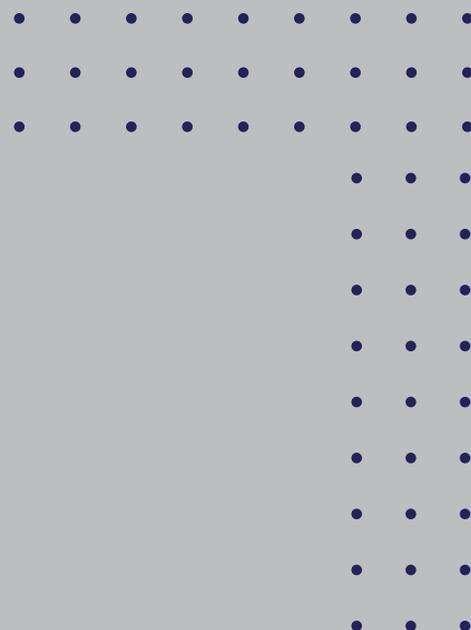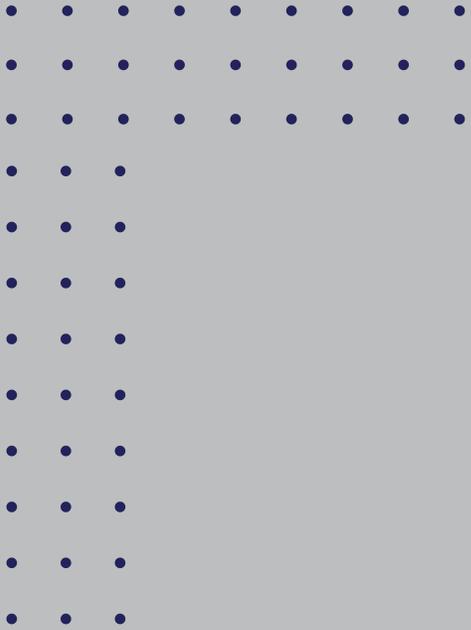
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Result

With improved visibility into their financial data, the company quickly uncovered opportunities that had previously gone unnoticed.

KEY OUTCOMES

- Leadership gained real-time insight into company performance.
- Manual reporting across multiple systems was eliminated.
- Financial insights became easier to identify and act on.
- During early analysis, Simpatico identified a project that had been completed but never invoiced. The company issued the invoice and collected $180,000 in revenue that had been overlooked.
- Further review revealed an incomplete PPP loan process that had never been finalized. After completing the remaining paperwork, the company secured $680,000 in funding.

FINANCIAL IMPACT

- $180,000 recovered from an unbilled project
- $680,000 secured through finalized PPP funding

Total value uncovered: approximately $860,000

Success

Through Simpatico's **Managed Intelligence Provider (MIP)** approach, the company transformed disconnected financial systems into a connected intelligence platform.

Strategic Design

Unified reporting across multiple QuickBooks systems.

Automation & Scale

Integrated financial and operational data.

Data-Driven Decisions

Real-time dashboards for leadership visibility.

Ongoing Partnership

Continuous improvements as the business grows.

THE
Conclusion

This project demonstrates how Simpatico's **Managed Intelligence Provider (MIP)** model helps organizations unlock hidden value in their existing data.

By connecting financial systems and creating unified reporting, leadership gained a clear view of company performance and uncovered nearly **$860,000 in previously hidden financial opportunity.**

With Simpatico as their MIP partner, the company now operates with greater visibility, faster decision-making, and a stronger data foundation for future growth.

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