

## Product

Maxwell Systems® ProContractorMX®

## Company

Evans Chaffee  
Avon, CO

## Industry

Evans Chaffee is a full-service general contracting firm that handles residential, commercial, industrial, and disaster reconstruction projects ranging from \$10,000 to \$40 million, as well as provides construction and development consulting services.

## Challenges

Over the years the firm struggled with the lack of integration between their accounting and project management solutions, which created inconsistent data and many additional steps throughout their processes. Their accounting package was complex and had limitations. Plus, it was very difficult for the project managers to tell how much someone had been paid and where exactly the project was from a cost control standpoint; they needed more control over billings and less data entry.

## Solution

Evans Chaffee chose Maxwell Systems ProContractorMX as their all-in-one construction management software solution for seamless workflow across estimating, project management, and accounting. Their goal was have a person only touch an item once during the process, and they wanted a solution that would work well right out of the box and have their team work with the solution and its processes from end to end.

## Results

Using ProContractorMX, Evans Chaffee has been able to cut overhead, as well as eliminate mistakes and the potential for things to fall through the cracks, thanks to maintaining good checks and balances. Not only has the firm improved efficiency, but also the quality of managing financials and projects. Also, their project managers can be much more resourceful and swift in doing their costs to complete because all the data is right there at their fingertips. Plus, all-in-one solution has been instrumental in increasing productivity by managing project documents electronically.



## Maxwell Systems Case Study

# Evans Chaffee

As a full-service general contracting firm based in Avon, Colorado, Evans Chaffee runs a very lean, processed-based business. Founded in 1995, the company handles residential, commercial, industrial, and disaster reconstruction projects ranging from \$10,000 to \$40 million, as well as provides construction and development consulting services.

Over the years the firm has used a variety of project management solutions, including one that their chief financial officer, Michele Evans, developed herself. However, they have struggled with the lack of integration between their accounting and project management solutions, which has caused many additional steps throughout their processes and they found that the complexity of their long-time accounting package wasn't allowing them to do some of the simpler tasks.

“We noticed that with the disparate systems inconsistent data was beginning to creep in,” explained Chris Evans, CEO at Evans Chaffee. “It was very difficult for the project managers to tell how much someone had been paid and where exactly the project was from a cost control standpoint.”

Having conducted thorough software reviews in the past, and going through a nine-month implementation process for a software package that ended up to be not what they were promised, Evans Chaffee knew what they wanted and the options available.

“We wanted a program that would allow us to grow to \$100 million a year and we looked at probably 15 different solutions,” said Michele.

“This time around, we were smart enough to realize that we needed to find a solution that would work well for us right out of the box,” said Chris. “We didn't want to force our ways of doing things on to the software package. We wanted to work with the software package in the way it was envisioned and developed. Obviously, there would be some customization and tweaks here and there, but we wanted a solution that we could work within and we were committed to modifying our processes and procedures to the extent we needed in order to make the new solution work.”

## Making a Smooth Transition

Evans Chaffee selected Maxwell Systems ProContractorMX, an all-in-one construction software solution that provides end-to-end control and seamless workflow across the entire construction process from takeoff and

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estimating through project management and accounting. “Maxwell Systems offered a much better price point,” said Chris. “In addition to functionality, we were also looking to reduce our overhead, which meant increasing our efficiency and lowering our IT costs, so it was a huge consideration.”

Unlike most contractors who implement a product and then go through the training, Evans Chaffee decided to start out with the training. “When we purchased ProContractorMX, we wanted to do all the training videos before implementation so we would clearly understand how the product works and think about how we would modify our processes to work with the program.”

“The training and implementation process was pretty quick,” said Michele. “We used our Maxwell consultant’s expertise, but made the changes in the software ourselves. We figured, if we understand how it works, if a problem comes up, we could try to troubleshoot it. When we went live, it was a very smooth process.”

In addition to the training first approach, Evans Chaffee also set up a test database and ran what-if scenarios through the test system during the implementation process. They took previously completed small projects and ran mock-up scenarios, such as setting up a job and a contract, putting in invoices, running the invoices through the whole process, and generating financial statements.

Chris attributes the success of the implementation of ProContractorMX in large part to the process being driven from the top down. “It hasn’t been driven by employees trying to convince upper management that the solution is the greatest thing since sliced bread,” he said. “It has been a whole company effort with excellent management support. We were willing to accept lower efficiencies while the implementation was going on, which really helped to make the transition smoother.”

Evans Chaffee chose to roll out the all-in-one solution in a phased approach. Project management and accounting were the first phase, while the digital takeoff and estimating parts of the solution will follow in a later phase, thus allowing the company to adapt easily toward streamlining their processes even further. Evans Chaffee is currently implementing the Mobile Connect solution to electronically capture field data.

## Simplifying Invoice Processing

Chris shared the challenges with the previous solutions that included a variety of inefficiencies. The project managers wanted more control over billings because of the multiple steps and double data entry with the previous systems. They would enter invoices and field receivers into the project management system and hand code them, send them off to accounting to be entered into the accounting system for payment, and then go through them again and decide what to bill. Accounting would then prepare the billing, the project managers would make changes or approve them, and then hand them back to accounting and so on.

“The way our system is working now, we’ve certainly got checks and balances in place, but the project managers are entering their subcontractor and vendor invoices right into

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ProContractorMX and allowing accounting to simply review and cut checks based on payment schedules. Project managers have the ability to generate their own project billings and many steps have been eliminated,” Chris explained. “We’ve been able to get as lean as we could on overhead, which was a huge help in this economy.”

## Seamless Workflow

“From the accounting perspective, the simplicity of the integration is the key benefit,” said Michele. “ProContractorMX is intuitive, it works well, and it does what I need it to do.”

Their goal was to create processes where a person only touches an item once during the process. Michele explains: “Before, we had two groups of people doing essentially the same thing. We were able to cut overhead, as well as eliminate mistakes and the potential for things to fall through the cracks. Plus we can now maintain really good checks and balances.”

She added, “I love the efficiency that we’ve been able to achieve and the quality of the financial management from a project standpoint and just from the raw company standpoint.”

The efficiency also benefits Evans Chaffee customers, subcontractors, and suppliers. For example, when a subcontractor says that they have not been paid, the project manager no longer needs to direct them to accounting. They can simply look it up themselves and tell the subcontractor when they were paid and provide the specific check number. This eliminates steps for the accounting team and provides quicker feedback to third parties.

“It goes both ways,” said Chris. “In the previous systems, when we do our cost to complete on our project and are projecting whether we were going to make money or cut into our profit line on a job, we would need to involve the accounting department to provide necessary reports. Now, with the all-in-one solution, we no longer have to go to accounting to get that data. Project managers can be much more efficient in doing their costs to complete because all the data is right there at their fingertips. They can’t manipulate it because of the controls we have in place, but the data is there and they can see exactly who’s been paid what, what invoices have been sent, what invoices are still outstanding, or if there is a hold for insurance issues or other reasons.”

## Managing Project Details

Evans Chaffee has always had a good handle on project details; however, the ability to create, track, organize, route, and manage project documents electronically in an all-in-one solution has been instrumental in increasing their productivity even more.

The ability to scan and attach files and have them embedded in the system is a key benefit of ProContractorMX that the general contractor highlighted. They invested in scanners for every desk, helping to eliminate the need to store paper and saving them in storage space and time required to archive.

“One of the things that is very, very helpful is that because we are attaching invoices at

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the point of entry, they are all in the system, so when we send out a billing, the project manager can dump out PDF files of all the backup invoices and attach them electronically to the bill and email the bill and backup without ever having to go to accounting,” said Chris. “It was a much more labor-intensive process before requiring we take all the paper invoices and scan and attach them to the billing.”

This embedded files capability also really helps at the project close out. At the end of a job with the previous method, the firm had to sort, clean up, organize, and box up all the paper files for storage. Chris explained: “With ProContractorMX, we’ve eliminated all of that. We essentially have no paper at this point. We do send paper out to the field, but everything is scanned and embedded in the project database. Other programs allow you to attach files, but they are stored on your hard drive. If you move the folder all the links break. With ProContractorMX, they are actually embedded in the database. So, if I come back to a project a year down the road to look something up, all the files, attachments, and backup documentation for change orders are all there. I don’t have to go search in the archives. We are touching things once. You get the paper, you scan it, you attach it, and you can then use it.”

## Going Mobile

Evans Chaffee also plans to leverage the power of ProContractorMX Project Connect and Mobile Connect in the near future to provide easy and convenient access to important data on an iPad mobile device. They are still doing handwritten timecards, which the project managers are entering in the system. The general contractor wants to rollout iPads on the jobsites to allow their supervisors to have access to RFIs, plans, and other important project documents, instead of the office having to print out hard copies for them. They will be able to enter timecards electronically where project managers can simply review, approve, and send them on. “I’m really looking forward to the efficiencies that that is going to gain us as well,” said Chris.

## Looking to the Future

As a sophisticated contractor that has a clear understanding of controls and procedures and a good technology background, Evans Chaffee has found that they are able to work with the developers at Maxwell Systems to help influence the future direction of system. “We have felt that we are listened to, which is huge. We were not looking for something that does everything under the sun. We were looking for something that does what we need. Very quickly after we signed on, we saw enhancements in the solution that we had recommended.”

Michele added, “As they continue to enhance ProContractorMX, Maxwell Systems is positioned to make a huge dent in this market with a program that no one else can touch.”

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