



Halff Associates Inc. decreases WIP days by drastically improving their invoicing process with EleVia.

Halff Associates **OVERVIEW**

Halff Associates is a unique regional consulting firm that has provided full-service engineering, architecture, and related services for decades.

www.halff.com

SITUATION

Since the early 2000s, Halff Associates Inc. was using another accounting system. Their invoicing was entirely paper for more than 1,000 invoices per month, across 15 offices. They had three primary issues with this legacy system they were eager to solve.

First, the process was time-intensive. They had to print invoices, manually mark them up, scan them and send invoices individually via email.

The second issue was that the process was decentralized, making invoice tracking very difficult. In order to be tracked, all invoices would have to be scanned with any new comments written down. "It was a big mess. It felt like all our project accountants were doing their own thing without any transparency or understanding of where things stood," said Joseph Sagel, Financial Director at Halff Associates.

The third major issue they were having with their legacy system and the manual invoicing process was a lack of support for customized workflows. Project accountants were required to keep a binder with individual clients invoice requirements, which often entailed manual adjustments for each invoice outside the accounting system.

"If we wanted to use our legacy system provider's help to improve our invoicing processes, it was cost prohibitive - we weren't really able to tailor it to us," said Joseph.

SOLUTION

Halff Associates implemented Deltek Vision and EleVia's EI (Electronic Invoicing) in 2017. More recently, Halff has also adopted PAT (payables approval and tracking) for more efficient and transparent AP.

EleVia's EI software has helped Halff with each of their three primary difficulties:

1

MORE EFFICIENT - With EleVia, Joseph says, "we're a lot more efficient and a lot more consistent on a per project basis. I'd say 15-20% more efficient."

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EleVia is specific to our industry (architectural & engineering) and have been a part of it for a long time. They know our pain points and what can be done better. They can implement it in a way that's intuitive and that speaks to what makes sense for operating our business.

- Joseph Sagel

Financial Director

HALFF ASSOCIATES

2 CENTRALIZED INFORMATION - "We can easily look through all the invoice stages on EI, as it sits right on top of Deltek. I know where everything stands, what's outstanding, what's settled. We have automated emails that go out to our billers letting them know what they have and have not done, so now everyone is on the same page and accountable," said Joseph.

3 CUSTOMIZABLE - With EleVia, Halff can customize invoice stages; who reviews an invoice can be tailored to the needs of each client. They can also customize how they view project performance information. "There can be so much variety firm to firm. It's really nice—we can configure the numbers to our firm's requirements and decide how we want to view the numbers, make relevant comparisons and see the metrics that speak to us," said Joseph.

RESULTS

- **WIP FROM \$7.2M TO \$8.0M** (before EleVia to current)
- **ANNUAL REVENUE** from \$97.5 M to \$134.8 M (before EleVia to current)
- **WIP DAYS DOWN** from 27 days to 22 days (before EleVia to current)
- **SMOOTH, CUSTOM IMPLEMENTATION** - "In our EI implementation with EleVia, they were documenting how we did things before and worked with us to define what opportunities we have to do things better. They identified some best practices for our industry and helped us adopt those and made it part of one of their packages," said Joseph.
- **TRANSPARENCY** - "Adding PAT has added a lot of transparency. Now we know where things stand, in what stage, how many invoices we brought into the system today, how many are in review, how many are approved. It's simple, everything is right there, and all of the information relates to where we stand in our process," said Joseph.
- **IMPROVED ACCURACY** - "EleVia allows us to better enforce our accounting controls that we want in place. That has significantly improved our accuracy, getting things properly coded and applied. Now we aren't going back and saying 'whoa why is this wrong?' We are getting it right, up front," said Joseph.

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