

Success Story

Construction and design firm saves 20 hours each week

MyAssistant for Sage 300 Construction and Real Estate allows Berkowsky and Associates to spend more time on bidding, winning, and delivering profitable projects.

Company overview

Now in its third decade, Berkowsky and Associates is a WBENC-Certified Women's Business Enterprise and a family-run business with a strong client-focused approach. The company provides a full complement of design, construction, and project management services, handling projects within a wide range of size and scope. Employing a multi-disciplinary team of specialists in-house, including architects, designers, drafters, LEED-accredited professionals, project managers, cost estimators, and superintendents, Berkowsky and Associates works collaboratively with its clients throughout the phases of every project.



Executive summary

A long-time user of Sage 300 Construction and Real Estate, Berkowsky and Associates learned about MyAssistant from its Sage business partner, and quickly saw the value.

Results with Sage MyAssistant

- Saving the equivalent of 20 hours each week.
- Delivers project managers job reports without the need to access the accounting application.
- Ensures myriad of critical tasks are completed and issues flagged for attention.

Sage

Company
Berkowsky and Associates, Inc.

Location
New Jersey, USA

Industry
Construction

Sage Products
MyAssistant
Sage 300 Construction and Real Estate

**BERKOWSKY**
AND ASSOCIATES, INC.
DESIGN • CONSTRUCTION • PROJECT MANAGEMENT

Constructing excellence and building a legacy

Siri Berkowsky Heinrichs is a very busy executive — and she wouldn't have it any other way. As CEO of Berkowsky and Associates, Inc. — the construction and architecture firm her father founded in 1990, Siri is leading the company through one of the most rapid growth periods in its history. Berkowsky and Associates provides design, construction, and project management services to commercial enterprises throughout the state of New Jersey. The company remains family run — father Mark Berkowsky serves as its President, and brother Eric is Executive Vice President.

The personal assistant for business executives

The company has successfully relied on Sage 300 Construction and Real Estate for years, but the software hadn't been recently updated. So Siri, in her previous role as the company's treasurer, launched an initiative to upgrade the crucial technology, reaching out to the company's trusted Sage business partner.

"I met with our consultant, and we agreed it was time for a refresh," recalls Siri. "Our Sage business partner walked us through the new features that had been added to Sage 300 Construction and Real Estate since our last update and introduced us to MyAssistant."

MyAssistant is the activity and business monitoring tool busy construction teams depend on to keep them out in front of the action and inform their decisions in real time. It works by proactively monitoring key performance indicators, delivering instant alerts about issues needing attention and including the information required to take action. MyAssistant automatically generates reports, spreadsheets, documents, and email alerts — and distributes this critical information into the hands of those who need it throughout every phase of a project.

When Siri learned all MyAssistant could do, she instantly recognized its value to a busy executive. "We operate with a lean staff, so I have a lot on my plate," she says. "MyAssistant can take some of that workload — it automates tasks that we used to perform manually."

Leading from the front

Siri relies on MyAssistant to monitor company and project data and alert her to conditions that may warrant action or a closer look. An example is the ongoing verification of subcontractors' insurance coverage. "Now we get an alert when someone's policy is expiring so we can take proactive action," Siri explains.

Another task that MyAssistant has taken on is to notify Berkowsky and Associates' billing department when it's time to invoice clients for their portion of insurance overhead, providing a report with the contract value along with the amount to bill.

In addition, Siri has configured MyAssistant to generate and automatically deliver time-sensitive reports, such as a listing of contracts not yet executed, and a Monday morning receivables aging report.

The most helpful tool in the toolbox

When managing lots of crucial details, it's easy for some tasks — such as acknowledging employee birthdays or work anniversaries — to slip off the to-do list. To stay out in front, Siri configured an alert to remind her of important upcoming dates like these.

"We also use it to send weekly project reports to design managers," Siri adds. "It's ideal because we don't have to give them access to the accounting system for them to have the project status details they need to perform their jobs."

As busy firms like Berkowsky and Associates look to scale their operations without adding headcount, MyAssistant is an ideal hire.

"MyAssistant is one of the most helpful tools I have in my toolbox," Siri concludes. "It would easily take the work of one part-time employee to do what MyAssistant does. That's the bottom line — MyAssistant saves us 20 hours every week."

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Chief Executive Officer, Berkowsky and Associates, Inc.

