

# Corporate Mechanical:

At Corporate Mechanical, software drives success

## SAGE MASTER BUILDER

How does an HVAC business grow from scratch into a \$9 million enterprise in six years?

For Corporate Mechanical of Tewksbury, Mass., it started with software.

“We began using Sage Master Builder when we launched the business, and it has been a key driver of our growth,” says Margaret Mahoney, the firm’s president. “The software has been a huge help in how we manage our work, but just as important, it has gained us enormous credibility with our clients. Because of that credibility, our clients felt comfortable giving us larger jobs that have fueled our growth.”

As with most start-ups in the construction industry, Corporate Mechanical started with small projects in the five-and six-figure range. Today the firm, run by Margaret and her husband Mike, is among the most successful of its kind in New England. The business manages as many as 20 projects at a time, including some that run into the \$4 million range.

In Mahoney’s view, one of the best decisions that she and her husband made was to purchase Sage Master Builder.

The firm has used the software to manage every facet of its profit cycle – estimating, production, accounting and analysis.

“Sage Master Builder gives us everything we need to run our business in the most efficient and profitable way,” Mahoney comments. “As our business has grown and jobs have become more complex, we have used the software to find solutions for every challenge. Through Sage Master Builder, we have been able to show our clients that we take a professional approach to everything we do. I can’t say enough about it.”

Corporate Mechanical started with Sage Master Builder’s financial modules, which it used to streamline accounts payable and receivable and payroll functions. But as the business grew, the firm’s relationships became more varied and complex. While Corporate Mechanical is primarily a subcontractor to general contractors, the firm has also become a contractor itself, hiring out for affiliated services such as sheet metal work and pipe insulation. To stay on top of every data stream, Mahoney added Sage Master Builder’s Project Management module in 2004. The module helps the team to better track job costs, change orders and the overall work flow on each project.

“The job cost function lets us track on a real-time basis exactly how we are doing on each job versus budget,” Mahoney says. “If we



## UNITED SOLUTIONS

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see any discrepancies on materials or labor costs, we can work with the foremen to address those issues in a timely manner. The system monitors performance — and profit.”

The team has also found value in the Equipment Management module, which keeps track of vehicle fleet costs.

“We have found that every time we have a new need, Sage Master Builder can meet it,” Mahoney says. “It provides every function needed to tie every facet of a project together.”

Today all eight of Corporate Mechanical’s full-time employees in the home office regularly use some feature of Sage Master Builder, as do all of the firm’s project managers. The result: a uniform approach to managing a numbers-intensive business where data changes all the time.

As much as Mahoney values the software, she is equally bullish on the service behind the product. When she bought her first module back in 2001, Mahoney and her team received training from Melissa Lewis. Today, when Mahoney or a colleague needs help, they reach out to United Solutions, which is Sage Master Builder’s partner in the New England market. Their United Solutions service provider is the same Melissa Lewis who got them started six years ago.

“Melissa is unbelievably good at explaining how the system works,” Mahoney says. “She speaks in language we can all understand, and she is a calming influence. And I really appreciate that she will come

to our office to do the training. My colleagues and I find that to be the best learning environment.”

Mahoney also appreciates being able to have customized reports created for her business. “If I see a report that doesn’t give me exactly what I need, I call United Solutions and they create it for me,” she says. “USI is always there when I need them. They are second to none in service. Whenever I have a need, I talk with someone live, someone who has the knowledge to address my questions.”

For example, Mahoney and her team worked with Lewis to create a report on Workers Compensation that enables the firm to receive a rebate from the state each year. In a second example, Lewis designed a report that enables Mahoney to evaluate each project manager’s contribution to profitability, and then set bonuses accordingly. The report not only details profitability on completed jobs, but also on jobs in progress.

#### CORPORATE PROFILE

Corporate Mechanical has played a role in completing a number of prominent residential and commercial buildings. Among them are 360 Newbury Street Condominiums in Boston, Harbor Towers Condominiums in Boston and several facilities for Fidelity Investments in Boston and Merrimac, N.H. The firm has also done work on Kool Smile dental facilities in several communities around Boston.

Mahoney points to one other important benefit to her Master Builder software. “Our accountants love the system” she says. “It gives them everything they need to close our books at the end of the year.”

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*– Margaret Mahoney, president, Corporate Mechanical*

### CHALLENGE

How does an HVAC start-up earn credibility and drive growth?

### SOLUTION

Sage Master Builder Software.

### RESULTS

Corporate Mechanical uses the software to manage every facet of its profit cycle – estimating, production, accounting and analysis. The software has helped the firm earn the trust of its customers and grow into a leader in the New England market.