

Case Study

# VeeBee Cooling's Journey to Transform their Purchasing Process



# Introduction

New York-based VeeBee Cooling was growing rapidly. As a leading provider of HVAC solutions, homeowners and businesses in the area chose VeeBee Cooling for new HVAC units as well as maintenance on existing units. Yet with this growth came a new challenge that needed to be solved if the company was going to continue to scale.

VeeBee Cooling had spent years managing its purchasing and material management processes by hand in a decentralized system. With a focus on installation and repair of major HVAC brands, purchasing both parts and full HVAC units is core to VeeBee Cooling's business.

**"My first impression was WOW! It's a new concept in purchasing without the need for phone calls and messages or you name it. It was clear there would be no more losing dialogue or important information about orders or anything like it."**







The existing system not only impacted company operations but also meant that procurement was not as efficient as it could be. The VeeBee Cooling leadership team realized the necessity for a streamlined process to enhance operational efficiency, minimize errors, and maintain financial integrity. It was time for a change.

The search for a solution led them to Trimble® Materials, a digital platform designed to revolutionize purchasing workflows in the construction industry. The transition wasn't merely about implementing a new software; it was about changing the operational culture and aligning a crucial set of processes with the company's strategic goals.

The aim was clear: to leverage Trimble Materials's capabilities in transforming the existing manual purchasing process into an organized, automated, and efficient system. As a result, VeeBee Cooling would have better project management and improved financial control.



# Discovering Trimble Materials

The journey to transform the procurement process began about four years ago when inconsistencies in the existing system became glaringly apparent. The informal procedure of sending text messages for order placements to suppliers was not only unconventional but was becoming a cause for concern regarding financial accuracy and accountability.

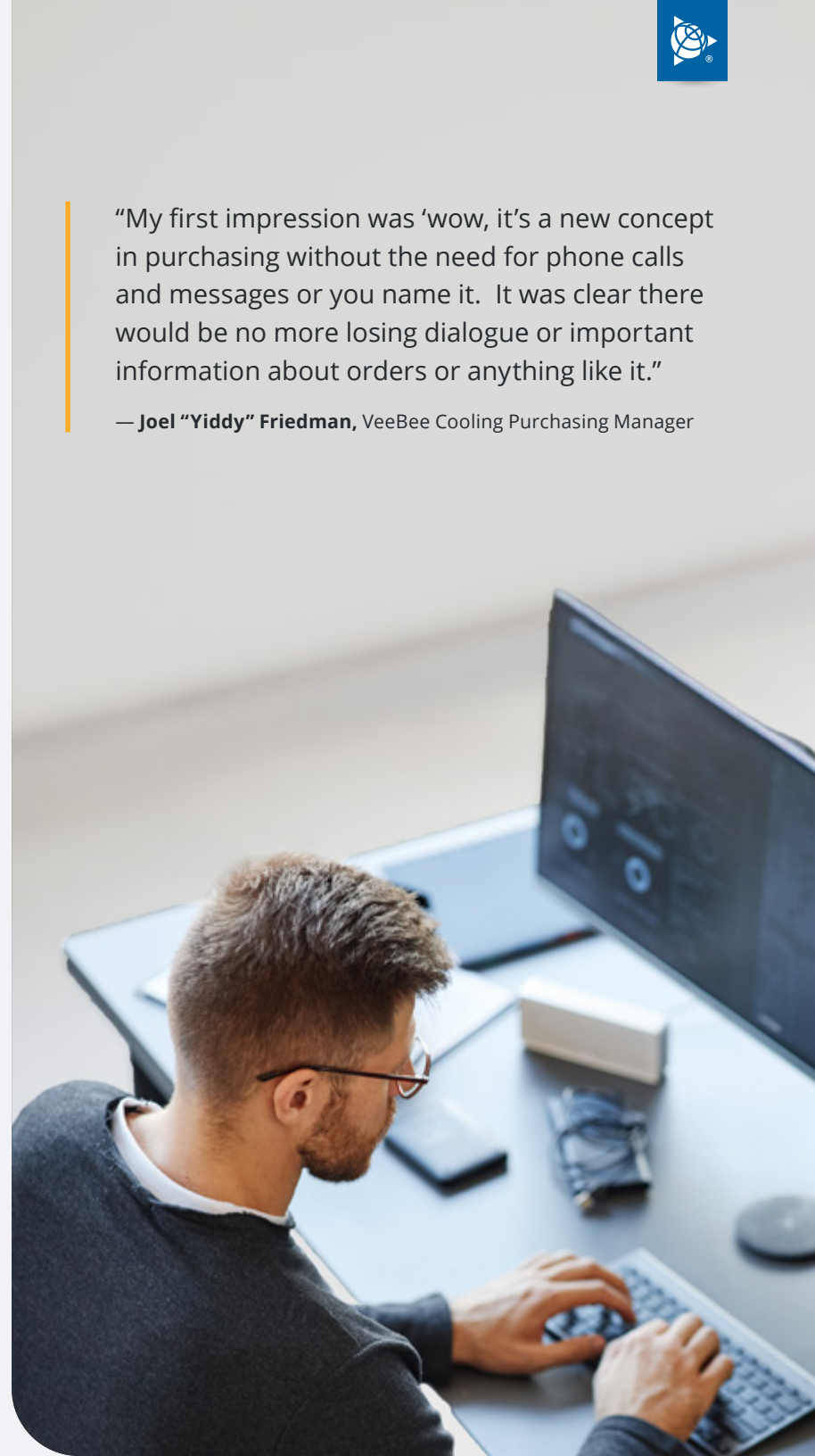
VeeBee Cooling did not have an approval flow in their previous workflow, which sometimes led to incomplete orders and risked delaying projects. Trimble Materials promised to streamline the purchasing process as well as bring a level of transparency and control that was much needed.

Upon seeing the platform for the first time, VeeBee Cooling Purchasing Manager, Joel "Yiddy" Friedman, was blown away.

The decision to choose Trimble Materials over other platforms was influenced by its construction-centric features, something other platforms lacked. The initial interaction and the promise of a structured workflow tailored for the construction industry made Trimble Materials stand out as the preferred choice for VeeBee Cooling.

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— Joel "Yiddy" Friedman, VeeBee Cooling Purchasing Manager



## Solution

Implementing Trimble Materials marked the beginning of a structured purchasing workflow at VeeBee Cooling. This digital platform provided a well-defined pathway from the initiation to the completion of the purchasing process, ensuring every step was accounted for. The primary focus was on enhancing the tracking of material orders for projects, budget monitoring, and efficient invoice management.

One of the significant features appreciated by the VeeBee Cooling team was the ability to track expenses on projects in greater detail and with accuracy compared to their previous system. Trimble Materials allowed a detailed breakdown of expenses, far superior to the single cost code system they were accustomed to. This feature was crucial in understanding the financial dynamics of each project, ensuring they stayed within budget or understood the reasons whenever they exceeded the budget.

Invoice management was another area that saw substantial improvement. The hassle of manual data entry, reviewing invoices, and matching them with the projects was significantly reduced. The integration with our ERP system further streamlined the financial workflow, making the entire process more efficient and less time-consuming.

“By implementing Trimble Materials and knowing who placed the order and who requested it, automatically gave (the owner and his team) that accountability that he was looking for.”

— Joel “Yiddy” Friedman,  
VeeBee Cooling Purchasing Manager





# The Benefits of Trimble Materials

The benefits of implementing Trimble Materials were immediately apparent. Right away, the impact was seen in the enhanced project expense tracking. Friedman highlighted how the Trimble Materials system helped in accurately monitoring the estimates versus actual expenses, providing a clear picture of where each project stood financially. This level of financial clarity was instrumental in making informed decisions and keeping the projects within budget.

Trimble Materials also gives VeeBee Cooling leadership the piece of mind that money is not being wasted and material is being ordered on time. Said Friedman, "By implementing Trimble Materials and knowing who placed the order and who requested it, automatically gave (the owner and his team) that accountability that he was looking for."

"I would definitely recommend Trimble Materials to other people in the industry. It made a big change in terms of purchasing in many ways in our company."

— Joel "Yiddy" Friedman, VeeBee Cooling Purchasing Manager





The time saved in invoice management was another notable benefit. Manual data entry, a significant time-drain previously, was now automated, freeing up valuable time for the team. Moreover, the ERP integration simplified the financial workflow, making it more efficient and less prone to errors. This integration not only saved time but also ensured financial accuracy, a critical aspect in maintaining the company's financial health.

Furthermore, the structured purchasing process brought a level of discipline in order placements, ensuring accuracy in orders and minimizing the chances of incorrect orders. The team excitedly embraced the new system, appreciating the ease and clarity it brought to the purchasing process. The streamlined process also meant fewer financial discrepancies, saving the company from potential financial losses.

"The invoicing feature is a lifesaver for us. It's faster, less prone to errors, easy to use... it's made a positive difference for sure."

— Joel "Yiddy" Friedman, VeeBee Cooling Purchasing Manager



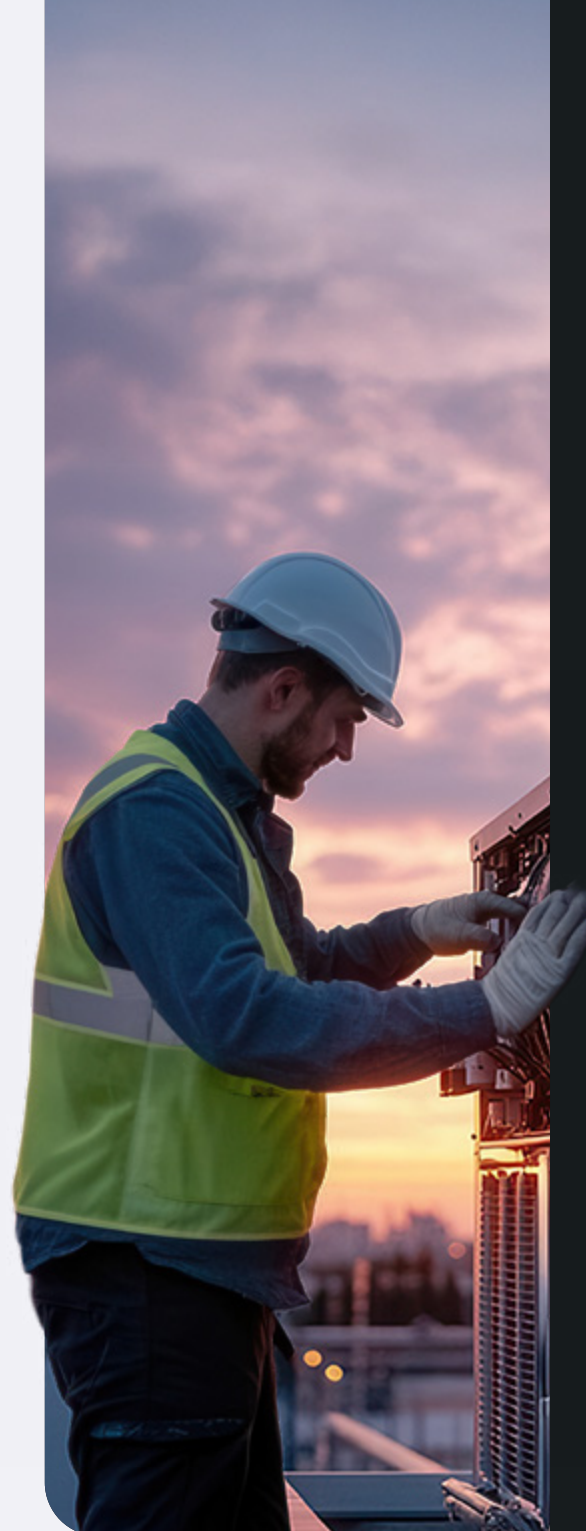


# Conclusion

The adoption of Trimble Materials by VeeBee Cooling showcased a classic transformation from outdated processes to a structured, efficient operational environment. The journey, steered by Friedman, brought about significant positive changes in how the company managed its purchasing process.

The benefits extended beyond just a streamlined purchasing process - it touched upon critical areas like financial accuracy, time-saving, and operational efficiency. The case of VeeBee Cooling stands as a testament to how digital transformation, when aligned with organizational goals and executed well, can bring about substantial operational improvements in the construction industry.

The experience of VeeBee Cooling with Trimble Materials underscores the importance of embracing digital solutions in modernizing operations, ensuring financial accuracy, and achieving operational excellence in the fast-evolving construction industry landscape.



"I would definitely recommend Trimble Materials to other people in the industry," said Friedman. "It made a big, positive change in terms of purchasing in many ways in our company."

— **Joel "Yiddy" Friedman,**  
VeeBee Cooling  
Purchasing Manager



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#### About Trimble

Trimble is developing technology, software and services that drive the digital transformation of construction with solutions that span the entire architecture, engineering and construction (AEC) industry. Empowering teams across the construction lifecycle, Trimble's innovative approach improves coordination and collaboration between stakeholders, teams, phases and processes. Trimble's Connected Construction strategy gives users control of their operations with best-in-class solutions and a common data environment. By automating work and transforming workflows, Trimble is enabling construction professionals to improve productivity, quality, transparency, safety, sustainability and deliver each project with confidence.