



CASE STUDY

UMC

How UMC Simplified Construction HR
and Service Management Workflows
with Trimble Construction One



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Photograph by Ben Benschneider

ABOUT THE COMPANY

UMC's storied history as one of the Pacific Northwest's leading full-service, design-build mechanical contractors, energy consultants and servicers dates as far back as 1920, when the company was founded in Seattle. UMC has played a major role in some of the region's most iconic and complex projects—from the original build of the Seattle Space Needle in the 1960s to the “Amazon Spheres,” three dome-like glass greenhouses and workspaces that opened in 2018 at the online retail giant's downtown Seattle campus.

Today, UMC is headquartered in nearby Mukilteo, Wash., with offices in Everett, Fife, Redmond and Seattle. It specializes in building performance optimization by providing cutting-edge building automation—including building optimization tools—for its customers, helping them achieve their required efficiencies, all the way down to net-zero facilities.

UMC works directly with clients to design their systems from the ground up, providing design engineering, energy consulting, building automation, manufacturing, reality capture scanning services, construction and regular equipment maintenance and repairs. This delivers on UMC's mission to help clients and partners plan, build and manage their buildings, facilities, or construction projects while removing worry, delay, angst and confusion, so its clients and partners can get back to focusing on what they do best. UMC's workforce includes about 250 field employees and 180 office employees.



Photograph by Ben Benschneider

BEFORE TRIMBLE VIEWPOINT'S CLOUD CONSTRUCTION SOLUTIONS:

- Multiple third-party software and integrations extracting data from each into UMC's Vista ERP
- Limited recruiting, onboarding, training and other HR capabilities slowed workforce development
- Outdated service management workflows for things like work orders, dispatching, client services and more
- Additional work needed to protect company's data, manage on-prem servers and more

AFTER MOVING TO THE CLOUD WITH THE CONNECTED TRIMBLE CONSTRUCTION ONE SUITE:

- Company has been able to consolidate software systems and simplify connected data and workflows
- Streamlined HR processes allow new hires to get up and running quicker and employees to self-serve their HR needs
- Mobile work order capabilities empowering service techs in the field, turning quicker billing cycles and improving customer service
- Less IT strain and better data security and business continuity safeguards in place
- UMC has scalable construction technology platform on which it can leverage new technologies and realize new efficiencies



Challenge

When a company like UMC evolves into a prominent force in its regional market, there can be some growing pains along the way. This is especially true when managing increasingly complex and demanding projects, while balancing the needs of a growing workforce and streamlining data, workflows and internal resources to find greater efficiencies.

Like with most other contractors, the past few years have created additional pressures as well: adapting business processes amid a pandemic; attracting and retaining skilled talent amid continuing labor shortages; navigating material supply chain challenges and rising construction costs; and, of course, keeping its own construction and service contract clients happy.

“Today the biggest challenges are inflation and related supply chain problems, as well as staffing issues related to the social and economic upheaval spurred by the pandemic,” said Pat Damitio, UMCs vice president of operations. “UMC is hoping that evolving technology will help the company get past these challenges to streamline processes and make them more efficient.”



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— Pat Damitio, VP of Operations, UMC



Challenge continued

UMC prides itself on being a tech-forward and best-practices-driven company. It has invested heavily in new manufacturing and warehouse space in order to streamline work and eliminate waste, recently opening a 100,000-square-foot facility at its Everett location.

“We have nearly doubled our manufacturing floor, where we build prefabricated building systems onsite. Then, we ship those systems out to the jobsites for installation,” Chris Betlach, UMC’s IT director, said. “It minimizes the amount of waste, significantly decreases the number of errors and the number of installers and other workers needed at the jobsite. This, in turn, leads to a more efficient and safer jobsite.”

The company is also a long-time user of [Trimble Viewpoint](#) construction management solutions, dating back to 1998 when it implemented what is now the [Vista enterprise resource planning](#) solution. Over the years, UMC has relied on Vista to support its growth and meet its construction-specific business needs.

As technology has advanced, however, Betlach noted the company had reached a point where it needed to transform its own operations to keep pace. Specifically, Betlach said, UMC was looking to reduce the number of third-party systems it was using and to close collaboration and data gaps between different construction disciplines like accounting, HR, project management and service management. Because of the lack of



Photograph by Kateryna Babaieva

Challenge continued

connection between these multiple systems, there were still a lot of manual processes, added time and additional oversights that were needed to ensure their projects and business management were on track.

It was time to move to the cloud, Betlach said.

“When UMC moved to the Vista cloud in 2019, we wanted to improve server uptime, security and accessibility of our Trimble Viewpoint Vista system,” he said. “We also wanted to explore some of the new cloud functionalities, and overall, simplify the administration of the system.”



Photograph by Jonathan Cooper

Solution

Betlach was well-versed in running the Vista on-prem version, having done so for many years with his previous company. “We were just a small specialty contractor in Minnesota. When I started, we were around \$20 million in sales,” he said. “By the time I left, we were coast to coast and around \$200 million. During that growth, because of Trimble Viewpoint, we didn’t need to hire any additional people in accounting because we were able to have our project management team do a lot of those traditional accounting functions through Vista.”

Betlach said it can be a lot for an IT department or software administrator to manage Vista on premise. “With the on-prem solution, we did all the updates, security and backups in-house, and it was a lot of work. If you’re short on staff, especially now with it being difficult finding and retaining talent, it makes sense for a lot of companies to move to the cloud.”

Betlach said making the leap to the cloud with Trimble Viewpoint and the connected [Trimble Construction One](#) suite opened a whole new world of opportunities. One of the biggest benefits, he noted, is the opportunity to replace multiple third-party vendors with a single suite of construction and business applications that share data and workflows between them. Two areas that have already seen huge positive impacts for the company are human resources (HR) and service management.



Photograph by Tolu Olubode

Viewpoint HR Management:

The cloud and Trimble Construction One allowed UMC to add [Viewpoint HR Management](#), a connected solution that digitizes and streamlines traditional HR workflows like recruiting, hiring, onboarding and training. It also takes the burden off HR teams by allowing employees to self-serve many of their own HR needs like viewing pay stubs, entering and tracking time, updating personal information and more through easy-to-use online portals.

“Before Viewpoint cloud, our onboarding process was a manual pen-and-paper process,” Betlach said. “Employee information was double entered into multiple systems. Now, it’s the employee who enters their information into the system. For example, when I was onboarded, I typed in all my information. Once I was approved, our payroll team was able to pull that directly from the portal without any double entry, and I was up and running.”

Letitia Cannataro, UMC’s training and development coordinator, noted that the applicant tracking and onboarding features of Viewpoint HR Management have streamlined data collection and reports for areas like EEOC compliance. “We can now easily capture demographics, locations, number of applicants, sourcing and others to give updates to our executive team promptly,” she said. “These updates used to be tedious as we had to review everything to create monthly reports.”



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Solution continued

Perhaps the best feature for Cannataro, though, is Viewpoint HR Management's integration with JobTarget. This has helped dramatically boost identifying and recruiting skilled candidates, while also reducing the company's recruiting spend.

"We have cut our recruiting costs in half by using JobTarget. Before JobTarget, we only used Indeed and LinkedIn," Cannataro said. "Now, (JobTarget's) AI system posts our job postings on numerous sites and begins stripping away the unnecessary sites that use up our click costs daily by eliminating them if they have little to no clicks. We now recruit more than 10 to 15 jobs each month using half the spend and have more qualified candidates."



Vista Field Service:

On the service management side, the cloud enabled UMC to implement a mobile work order solution that simplifies service management workflows, while enabling and empowering service technicians in the field.

Vista Field Service provides technicians with all the information they need to complete their work for the day, and instantly pushes data about what work was done back to the office—all via their smartphone. The easy-to-use mobile interface enables fast adoption for technicians, allowing them to work quickly and efficiently while on the go. Whether looking up work site equipment and historical information, adding and tracking additional inventory or costs needed, or capturing electronic signatures from customers to approve work or sign off on completed work, the real-time workflows ensure jobs move faster, bills are issued and paid quicker, and customers are happier.

For Betlach, that's key to improving the company's service workflows and commitment to client satisfaction. "Service is a significant component of our business," he noted. "There are around 40 techs and they're all using Vista Field Service daily. We have two dispatchers that do the work order setup and scheduling in the back office. We went live with Vista Field Service this past January, moving away from a third-party solution."



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— Chris Betlach, IT Director, UMC

Solution continued

Betlach said that UMC's service dispatchers can now communicate work order information directly to the field. "All of the information they need is right at the techs' fingertips without having to call anyone in the back office," he said.

He added that UMC is now also able to easily create detailed reports for its customers that summarize their equipment, the work that's been done, costs and more. "One of the reports we've done for clients is EPA tracking. For compliance reasons, we are required to track the refrigerant going into and out of a system. We're able to do that on a per-equipment basis and roll it up to the site level," he said.



Results

Moving to the cloud with Trimble Viewpoint has allowed UMC to become an even more agile, data-driven company, delivering on its tech-forward strategy and improving the way it works.

On the HR side, in addition to finding better candidates for its workforce, UMC can get new employees onboarded, trained and working much quicker. “We have cut our onboarding time by half because the paperwork is easier to complete and legible,” Cannataro said.

The self-serve HR portals have also removed typical HR burdens. “We are experiencing a decrease in outdated information because employees can now make the changes themselves in the Employee Portal,” Cannataro said. “It eliminates unnecessary email reminders to update information.”

Betlach said the portal has improved time collection and accuracy as well.

“It’s really quick—much faster than our older systems,” he said. “There is a clone option that a lot of people use where they can clone the previous week. We also use a grid timecard for our



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Results continued

field staff so that our forepersons can enter time for multiple installers from one screen. The timecard system gives us an approval process, and our time entries get entered directly into payroll instead of having to wait for third-party integrations.”

UMC developed an in-house integration that now lets it push users from the HR module right into its Active Directory to set up user accounts. “It has helped streamline and provide consistency with things like titles and manager hierarchy. It’s now controlled through Vista as the one source of truth that feeds into our other systems,” he said. “That information also pushes into our SharePoint company directory through our intranet, and our signatures are also showing up in Outlook signature blocks.”

On the service side, UMC has rolled out more digitized forms in the field, with data from those forms auto-populating right back into Vista. Betlach said having all the data living in one system has led to much better reporting, visibility and customer support. It also has led to quicker billing.

“Our service team can do its own billing separately, without having to go through accounting,” he said. “Vista also helps us manage our service agreements and preventative maintenance work. The dispatch board is also great—a lot better than the old-fashioned Post-it notes on a board, which a lot of contractors are still using.”



Results continued

Another important aspect of Trimble Construction One that helps Betlach sleep better at night is the enhanced data security measures. “At UMC, we have a multi-layered security approach. We try to follow security best practices to harden our systems,” he said.

“Being in the Trimble Viewpoint cloud, we have their support team consistently monitoring the system for abnormal behavior or potential security threats,” he added. Trimble Viewpoint “does our patch management, Trimble Viewpoint updates and security, so that makes my life easier. Trimble Viewpoint is running on Azure Cloud. It’s a tested and proven solution and a lot of companies are on it now. Microsoft has had a good track record as far as uptime. We feel it’s a solid solution. You could run your own private cloud, but it’s going to take more resources, more skillsets and extra work. I’ve done it before but found it’s so much easier in the Viewpoint cloud.”

Betlach views Trimble Viewpoint as UMC’s primary technology partner. He has already managed to consolidate or remove multiple other software programs and third-party tech vendors by leveraging the Trimble Construction One suite, and he hopes to continue doing so.



Results continued

“The support has been great. The Viewpoint community has been great. We go to all the conferences and attend the webinars. We submit suggestions, and we’ve seen many of our enhancement suggestions implemented. Trimble Viewpoint takes our feedback seriously and we view them as a strategic long-term partner of ours.”

**Learn more about
Trimble Construction One**
[Welcome to Trimble Construction One](#)



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— Chris Betlach, IT Director, UMC



ABOUT TRIMBLE VIEWPOINT

Trimble Viewpoint construction software solutions, part of Trimble Connected Construction, allow contractors to better manage their projects, processes and people, using the data gathered to lower risk and improve margins. With more than 40 percent of the ENR 400 on our platforms, Trimble Viewpoint innovations are transforming the construction industry by connecting operations across financial and HR systems, project management tools and mobile field solutions.

For more information, please visit [Viewpoint.com](https://viewpoint.com)

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