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FREE GUIDE

The Project Visibility Playbook

Stop Hunting for Answers Across Five Different Systems

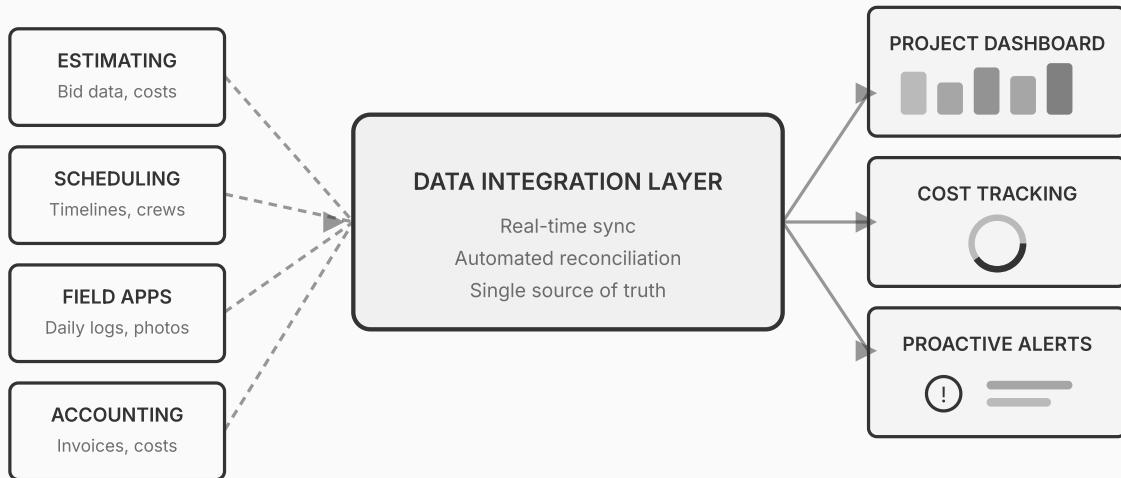
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Systems Unified

Consolidate 5 disconnected systems into one unified view.

Unified Project Visibility



Every general contractor runs into the same problem. Estimating lives in one system. Scheduling lives in another. The field crews use apps that don't talk to accounting. And accounting is three weeks behind because nobody can get the data they need.

When a project manager asks "how's this project doing?" the honest answer is usually "give me a few hours to pull everything together." Sometimes days. By the time anyone reads it, the numbers are already stale.

There's a better way. Not replacing your systems. Connecting them.

The Fragmentation Problem

A typical \$20M contractor runs at least five systems that should talk to each other but don't:

- Procore or similar for project management
- Sage, Foundation, or QuickBooks for accounting
- Excel for bidding and cost estimates
- Field apps for daily logs and time tracking
- More Excel for owner draws and billing

Each system holds a piece of the truth. None of them hold the whole picture. So people spend hours every week copying data between systems, reconciling differences, and building reports that are outdated before they're finished.

The CFO wants to know which projects are bleeding margin. The answer exists, scattered across three systems. Someone has to piece it together manually.

Your data isn't the problem. The walls between your data are the problem.

What Connected Systems Look Like

Picture opening a single application and seeing your entire operation. Not a dashboard of vanity metrics. Actionable information.

Project margin in real-time, not calculated three weeks after the fact. Change orders tracked from approval through billing without manual handoffs. Labor costs compared to estimates while there's still time to adjust. Cash flow projections based on actual progress, not guesses.

One electrical contractor we worked with had a PM who spent every Friday afternoon building a project status report. Four hours of pulling data from Procore, matching it against Sage, and formatting in Excel. Now that report generates itself. The PM reviews and adjusts, but the grunt work is gone. Four hours back every week. Two hundred hours a year.

The information was always there. Getting to it was the hard part.

Connecting Procore, Accounting, and Field Apps

Most project management platforms have APIs that allow data extraction. Procore's is particularly well-documented. Accounting systems vary, but even legacy installations usually offer some path to the data.

The approach is read-only integration. Pull data from each system into a unified layer. Don't try to modify the source systems. Don't create sync conflicts. Just read the data and combine it somewhere useful.

This sounds simple because the concept is simple. The execution requires understanding each system's quirks, handling mismatched data formats, and building something that updates reliably. But you don't need to replace anything. Your team keeps using the systems they know. They just get better visibility across all of them.

A mechanical contractor running Procore and Sage 300 built a unified view in six weeks. Budget vs. actual by cost code. Labor hours vs. estimated. Subcontractor commitments vs. invoices received. The data existed in both systems. Now it lives in one place.

Building Applications That Update Themselves

The traditional approach to construction reporting involves someone pulling data manually, building a spreadsheet, and distributing it via email. By the time anyone reads it, the data is stale.

Modern applications connect directly to your systems and refresh automatically. Open the app, see current data. No exports. No formatting. No waiting for someone to update the numbers.

This changes how people work. Instead of scheduling weekly meetings to review outdated reports, project teams check the application when questions arise. The superintendent on site opens their phone and sees cost-to-complete. The CFO reviews margin trends without scheduling a data pull. The owner asks about a specific project and gets an answer in the same conversation.

Automatic updates matter because stale data creates bad decisions. A project that looked profitable last week might be bleeding money today. By the time a manual report catches it, you've lost another week of margin.

Answering "How's This Project Doing?" in 30 Seconds

The goal isn't prettier reports. The goal is faster answers to the questions that matter.

"How's the hospital project doing?" Should take 30 seconds. Pull up the application. See current costs vs. budget by phase. See remaining work. See cash position. See the trajectory. Done.

"Are we going to hit the schedule?" Requires combining schedule data with actual progress. If those live in separate systems, someone has to reconcile them. If they're connected, the answer updates itself.

"What's our exposure on change orders?" Needs visibility into approved changes not yet billed. Pending changes awaiting decision. Historical change order patterns on similar work. All of that exists somewhere. The question is whether you can access it when you need it.

We built a project health dashboard for a \$50M GC that answers these questions instantly. Color-coded status at the portfolio level. Drill-down to individual projects. Drill-down to specific cost codes. The partners used to spend two hours before every leadership meeting getting up to speed. Now they review the dashboard in ten minutes and spend the meeting making decisions instead of gathering information.

What This Costs

Less than you think. Less than the time your team spends on manual reporting.

A basic visibility application connecting two or three systems runs \$25,000 to \$40,000. Implementation takes four to eight weeks depending on your systems and data complexity.

Compare that to the cost of the current approach. A project manager spending five hours a week on manual reporting costs roughly \$10,000 a year in loaded labor. A CFO spending half a day monthly reconciling project data adds another \$5,000+. Multiply across your team and the numbers add up fast.

One \$30M contractor calculated they were spending \$60,000+ annually in labor hours on manual data work. Their visibility application cost \$35,000. Payback in seven months. Every month after that is pure gain.

The technology isn't expensive anymore. What's expensive is continuing to operate blind.

The Data Quality Question

Every contractor worries about the same thing. "Our data isn't clean enough for this."

Here's the reality: connected systems expose data quality issues. That's a feature, not a bug. The problems already exist. You just can't see them when data lives in silos.

When you connect Procore to accounting and see that job costs don't match, you've found a problem that's been costing you money. Now you can fix it. When budget categories don't align between estimating and tracking, you've discovered why your job costing has always felt unreliable.

Visibility doesn't require perfect data. Visibility creates the pressure that leads to better data.

Start with what you have. Build the connections. Let the inconsistencies surface. Fix them as they appear. Six months later, your data will be cleaner than it's ever been because people can actually see when something's wrong.

Picking the First Project

Don't try to connect everything at once. Pick one high-value connection and prove the concept.

For most contractors, the highest-value starting point is job cost visibility. Connect your project management system to your accounting system. Build a view that shows budget vs. actual by job and by cost code. That single connection answers half the questions leadership asks.

From there, expand based on what hurts most. Cash flow forecasting. Change order tracking. Labor productivity. Each capability builds on the data layer you've already created.

The contractors who succeed don't pursue transformation. They pursue improvement. One problem at a time. One connection at a time. Each step delivers value. Each step makes the next step easier.

The Competitive Advantage

Most contractors operate with 30-day-old information. They make decisions based on data that's already obsolete. They catch margin problems after the damage is done. They scramble for answers when owners ask questions.

A contractor with real-time visibility operates differently. They see problems developing and adjust before the numbers turn red. They answer owner questions in minutes instead of days. They walk into negotiations knowing exactly where they stand.

This isn't theoretical. It's the difference between reacting and anticipating. Between hoping projects work out and knowing how they're tracking.

Your competitors are starting to figure this out. The ones who move first gain advantages that compound. Better decisions. Faster responses. Tighter margins on bids because they actually understand their costs.

Ready to stop hunting for answers? [Talk to our team](#) about building project visibility for your operation, or learn more about our [construction solutions](#).