anterraBI™ Customer Success Story
Summit Companies

anterra

FIRE PROTECTION, SECURITY, & LIFE SAFETY

Since 1999, Summit has been a leader in the fire and life safety space.

Summit Companies has built a portfolio of premier fire protection companies that collectively provide their customers with a complete set of services designed to protect buildings, assets, and people.

Summit operates as four companies: Summit Fire Protection, Summit Fire & Security, Summit National Accounts, and Summit Fire Consulting.

THE BENEFITS

- **Service management revenue increased from 10% to 50% due to visibility between systems**
- **Migration from consolidated financial spreadsheets and Crystal reports**
- **Scalable software for a company in growth mode**
- **Ad hoc reporting on critical business metrics for division managers**

> "Service Management reporting was a black hole because no one could get to the data! I absolutely would recommend Anterra for the visibility that we now have into our operations."
> — Matt Praught, CIO

THE CHALLENGE

Summit Companies is a national provider of comprehensive fire and life safety solutions. The company designs, installs and services fire suppression systems, sprinklers, fire extinguishers, clean agent systems, early detection explosion systems and helps customers with disaster planning.

The fire safety industry adheres to safety codes and standards for commercial buildings put forth by the National Fire Protection Agency (NFPA). This involves routine Inspection Testing Maintenance (ITMs) required for equipment and systems. Summit's expansion to provide solutions and services on a national scale required a comprehensive and scalable IT, financial, and operational reporting system.

The challenge for Summit was that they had disparate databases for service, inventory, and financial information. They had large volumes of data, but there was no ability to measure performance against plan.

Prior to Anterra, no one could get to the SM data. They used Excel and Crystal Reports to access their data to find metrics llike company revenue and margin. Matt Praught, CIO of Summit Companies explains, "Typically in accounting everything bounces **back** to the GL, but to find the detail you have to go the other direction. You have to look **forward** at transactions."

THE SOLUTION — AnterraDataCenter™ + AnterraBI™

In addition to Sage 300 CRE, Summit also implemented Sage's mobile solution, Sage Service Operations (SSO) to dispatch technicians who then complete Work Orders in the field. They also use Sage Service Management to manage Purchase Orders and Inventory.

Matt searched for a solution that could report across finance, operations and inventory across multiple databases. Anterra DataCenter™ was the perfect solution, transforming Sage 300 CRE Pervasive data into a preferred SQL environment. Furthermore, AnterraBI™ combines all of their data into dashboards, and pivot table reports — many of them created by Matt and his Analytics team.

> **"We have companies that operate in multiple states. We go to a dashboard, look at consolidated operating results, then drill to a pivot grid that can be sliced and diced by any factor: state, call type, location, technician, problem code, or any other factor. We have completely migrated away from Excel into interactive analysis in Anterra."**
>
> — Matt Praught, CIO

Attributing to the nature of a safety business, Matt also needed ad hoc reporting for monitoring customers' needs. Anterra and Summit collaborated with Anterra AdHoc (built on Amazon QuickSight) to sync with AnterraBI™ for reporting across roughly 30+ entities. Summit Companies has immediate visibility into inspection and testing data, sales prices, completed Work Orders, and COGs without configuring manual reports that formerly required a fleet of Crystal reports.

In response to the company acquiring more companies, Matt has created an internal training team dedicated to teaching which AnterraBI™ dashboard reports are critical to respective job positions.

> **"Now we have accurate data that we can access and say, 'You know what? We're in the fourth week of the month and you guys are at 30% of your budget. Get to billing!'"**
>
> — Matt Praught, CIO

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