

PARTNERSHIP IN ACTION

JOURNEY TO OPERATIONAL SUCCESS

With Deltek Vantagepoint & Aktion Associates



INDUSTRY

Architecture & Engineering

SOLUTION

Deltek Vantagepoint

NUMBER OF EMPLOYEES

global workforce of 1,600 employees

WEBSITE

ssoe.com

At A Glance

SSOE Group, an internationally ranked architecture and engineering (A&E) firm headquartered in Toledo, Ohio, manages over 2,000 projects annually. To maintain its leadership in delivering complex and innovative projects, SSOE needed a robust ERP system tailored to its unique requirements. Partnering with Aktion Associates, the largest Deltek partner in North America, SSOE successfully implemented Deltek Vantagepoint, transforming operations and positioning the firm for continued success.



“One of the key differentiators in this implementation was our collaborative approach. We restructured our team and prioritized collaboration, ensuring that issues were promptly addressed, and accountability was maintained. This strategy, combined with Aktion’s expertise and their Lean Implementation Process was pivotal to our success.”

Greg Rossler
Principal Vice President



THE CHALLENGE

In 2019, SSOE sought to upgrade its ERP system from Deltek Vision to a next-generation ERP solution that would address its unique business needs. SSOE initially selected another ERP system. However, the new system, partially implemented in 2022, did not meet the global firm's requirements. This necessitated a reevaluation of their ERP options, leading SSOE to Deltek Vantagepoint and back to a trusted partner, Aktion Associates. With their extensive experience and a long-standing relationship with SSOE, Aktion was well-suited to ensure the success of this critical transition.

THE SOLUTION

SSOE selected Deltek Vantagepoint for its advanced capabilities and alignment with its business needs. Aktion, with their deep expertise in ERP systems and a strong relationship with SSOE, played a pivotal role in the successful transition. The project was completed in under eight months, significantly faster than other implementations of this size.

"When we started working with SSOE, they had a strong internal team that fully understood their business model and

where they needed to go," said Jonathan Monroe, Vice President at Aktion Associates. "Our role was to evaluate the workarounds and internal processes they had created and transition them into Vantagepoint's native functionality while ensuring that their processes remained optimized and efficient."

One of the major transitions involved SSOE moving from its homegrown system to Vantagepoint's resource management planning. This shift demonstrated the robustness of Vantagepoint, as SSOE was willing to replace its custom-built process with the ERP system's advanced functionality.

Additionally, transitioning from legacy custom Vision processes to Vantagepoint's internal processes, such as moving from a message board to interactive billing and draft invoice approvals, marked a significant improvement in SSOE's operations.

"We've had such a good relationship with Aktion over the years, and their support throughout this process was invaluable," added Pamela Marciniak, Senior Application Analyst at SSOE.



"We knew the data migration would be easier and that Deltek was committed to creating a next-generation solution," said Michael Murphy, Executive Vice President at SSOE. "That trust in Deltek and Aktion Associates made all the difference when we hit the button to go live."

Michael Murphy
Executive Vice President



STRATEGIC GUIDANCE

From the outset, Aktion provided strategic guidance, ensuring SSOE was well-prepared for the transition. Aktion's comprehensive approach, from initial readiness assessments to on-site effectiveness reviews, allowed SSOE to migrate to Vantagepoint smoothly. By addressing challenges head-on with actionable solutions, Aktion's deep understanding of SSOE's needs played a key role in the project's success.

Monroe emphasized the importance of SSOE's commitment. "The SSOE team was fully committed from the start. They told us, 'We know what this is going to take, and we're going to give you the resources you need—we're going to own this project.' That level of ownership was a major factor in the project's success. They took full responsibility for ensuring its success, and we didn't have to push them to the finish line. We pushed each other and crossed the finish line together."

COLLABORATIVE APPROACH

Aktion fostered a collaborative environment, engaging closely with SSOE's internal teams in project planning, finance, and resource management. This partnership ensured that Vantagepoint met SSOE's specific business needs and strategic goals.



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Kris Morton, Managing Application Consultant at Aktion Associates, noted, "From a project management perspective, SSOE invested the time of its staff and process experts to redefine and reimagine workflows in Vantagepoint. This team found that Vantagepoint met the team's needs with very few custom requests, and they adhered to their plan, timeline, and resource commitments to successfully implement it."

SSOE's willingness to experiment with different solutions was crucial to the project's success. "They would suggest, 'We need another person to see the approval. What if we add this field here and adjust the workflow there?'" added Morton. "It was all about making Deltek Vantagepoint do what they needed, and they succeeded."

"One of the key differentiators in this implementation was our collaborative approach," explained Greg Rossler, Principal Vice President at SSOE. "We restructured our team and prioritized collaboration, ensuring that issues were promptly addressed, and accountability was maintained. This strategy, combined with Aktion's expertise and their Lean Implementation Process was pivotal to our success."



Aktion uses Asana, a project management tool that helps internal teams organize, track, and manage their work efficiently through task assignments, deadlines, and collaboration features. A compelling aspect of Asana is that it allows customers to collaborate directly with the Aktion team, ensuring everyone has access to the same data and can work together seamlessly.

A critical factor in the success of SSOE's transition to Vantagepoint was the structure provided by Aktion's Lean Implementation Process. This proprietary process serves as a detailed roadmap for all implementations, keeping projects on track and within budget. By integrating the Lean Process into Asana, every step of the project was documented and accessible in real-time, enabling both teams to collaborate effectively, communicate clearly, maintain momentum, and resolve potential issues before they could impact the project timeline.

"We always knew exactly where we stood in the project and what was coming next. It ensured alignment across the team and that no steps were overlooked, which was crucial for meeting our deadlines and staying within budget," Rossler added.

ON-SITE EFFECTIVENESS REVIEW & TRAINING

Aktion's hands-on approach, including an on-site effectiveness review, allowed them to tailor the Vantagepoint implementation to SSOE's specific needs, ensuring the system would support and enhance operations.

Additionally, Aktion delivered tailored training sessions that facilitated the quick adoption of Vantagepoint across SSOE's global workforce. By providing responsive support throughout the process, Aktion ensured that employees were well-equipped to leverage the new system's features.

"It was a true partnership," Monroe said. "Throughout the go-live process and the transition into the new system, Aktion was helping, right alongside the internal team, with support tickets to ensure they were fully prepared to take on the project."

Marciniak highlighted the impact of Vantagepoint's planning features. "The improvements in planning and resource management have been significant. The system's ability to automatically populate resources and provide visibility to project managers has been a huge time-saver and a game-changer for our teams."

RESULTS

The successful implementation of Deltek Vantagepoint brought significant improvements across SSOE's operations:

- **Increased Efficiency:** Vantagepoint streamlined project management and resource planning, leading to substantial efficiency gains. "For project planning, we now have information in one place, reducing duplication and human error. We also have a modern interface for project managers to work with, which has significantly improved our workflow," said Marciniak.

- **Enhanced Data Integrity:** The unified system provided consistent data across all records, eliminating synchronization issues and simplifying budget management.
- **Improved Financial Processes:** Vantagepoint's robust features for handling various billing types reduced the need for custom applications and tickets, allowing SSOE to focus on growth and seamless acquisitions.
- **Mobile Accessibility:** Vantagepoint's mobile app became a vital tool for SSOE's 1,600 employees, facilitating quick and efficient timesheet entries and expense report submissions, enhancing productivity across the organization. "Timesheets are the one thing all 1,600 of our employees use, including our CEO," said Murphy. "The mobile app makes that process convenient and saves time."
- **Cost Savings:** The implementation was completed in less than eight months—one-third the time and at 30% of the cost of the previous ERP attempt.

SSOE's collaboration with Aktion didn't just stop at the go-live phase. "They pushed our knowledge of the software and our execution to the max to achieve what they needed without resorting to a completely custom tool," Monroe stated. "SSOE asked for something innovative and creative, and they challenged the Aktion team to deliver—and we did. The solution worked so well that we're now applying it to other customers with similar needs."

Murphy added, "Having that trust in Aktion and seeing how quickly they responded to any issues gave us the confidence that our business wouldn't be disrupted during the transition. It was a seamless experience."

CONCLUSION

SSOE's successful partnership with Aktion Associates has been instrumental in the seamless transition to Deltek Vantagepoint. With a focus on collaboration, strategic guidance, and tailored support, Aktion helped SSOE achieve significant improvements in efficiency, data integrity, and financial processes. This journey underscores the power of the right technology and the right partnership in driving organizational success.

"The SSOE team didn't hesitate to pull billable, highly experienced people off other projects to focus on this one because they knew it was a priority for the company's success," Monroe added. "That level of determination is what's needed to accomplish their goals, and it's a testament to the strength of our partnership."

Marciniak concluded, "Vantagepoint has streamlined so much of our process, and the ongoing support from Aktion has been incredible. It's been a true collaboration, and we've seen tremendous benefits across the board."

THE AKTION DIFFERENCE

As a trusted technology provider, Aktion delivers everything a company needs to drive transformation. What makes Aktion unique?

- We're the largest Deltek Vantagepoint ERP software partner.
- We deliver high-value consultative services addressing business process improvement, including industry best practices, migration tools and innovative technology solutions.
- For software implementations, our proprietary Lean Implementation process ensures a successful go-live.
- We're a nationally-recognized cloud and managed services provider.
- We deliver the best support to customers using heritage products for as long as they choose to use the solution and provide customers with choices - choice of software, choice of licensing and choice of deployment.
- We cover the entire AEC industry and offer customers a comprehensive set of skills and deliverables:
 - Our industry-focused application consultants and engineers have deep Deltek product-specific knowledge.
 - Our relationships with software partners allow us access to a broad variety of ISV solutions.
 - Our Infrastructure solutions are focused on cloud readiness and security.

Deltek

Premier Partner

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Aktion Associates is an ERP software reseller and IT Infrastructure provider focused on the Architecture, Engineering & Construction, Distribution and Manufacturing industries.

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