

# Flexibility and Usability of Vista™ by Viewpoint Help Specialty Contractor Continue to Innovate and Grow



Bassett Mechanical provides custom-built mechanical contracting, metals manufacturing, and maintenance service solutions to customers throughout the United States and the world. Established in 1936, the company has grown into a trusted specialty contractor that handles design,

engineering, fabrication, installation, and service in specialty areas including industrial refrigeration, HVAC, industrial ventilation, metal fabrication, plumbing and piping, laser cutting, testing and balancing, and preventive maintenance. In addition to its 266,000-square-foot facility and fabrication plant in Kaukauna, Wisconsin, Bassett houses service locations in both Madison and Milwaukee.

Continued growth and innovation drives Bassett Mechanical forward to best serve their customers and support their Lean principles and processes. Having outgrown their outdated and custom software program to manage accounting and project management, the company explored new options and opportunities to help them improve.

“Considering that 97% of our work is custom, we really needed a program that was flexible and could handle all of the unique processes and things we need to do,” says Mike Kees, Manufacturing Project Manager at Bassett Mechanical. “We wanted a more efficient way to pull data for specific reports and allow us to track variations in labor and pricing. Custom work means every project is different, so it’s essential we find ways to cut down on operational inefficiencies wherever we can – we believed a flexible and feature-rich ERP software solution could help us do exactly that.”

Bassett Mechanical now uses Vista by Viewpoint to manage accounting, project management, operations, and more. “The flexibility of Vista is so valuable to us,” says Kees. The software allows the contractor to produce lots of helpful reports and respond to requests for analysis quickly. It’s important for our financial health that we get paid quickly, and by using the software, Bassett can give customers the documents they need (invoices, reports, etc.) the way they want to see them. That means Bassett is presenting accurate data in a professional format with the right details per customers’ request, and so billing, for example, can be processed efficiently and not returned with concerns and questions that slow down the payment and cash flow.”

## CUSTOMER OVERVIEW

**Contractor:**  
Mechanical Contractor

**Headquarters:**  
Kaukauna, WI

**Employees:**  
350 including field (150)  
and service technicians (50)

**Viewpoint Customer:**  
Since 2004



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In addition to flexibility, Bassett Mechanical appreciates that the Vista solution is easy to use. After spending about 10 years as a field employee, Roy Immel became Project Manager in Construction at Bassett, which required him to spend more time in the office and handling management and more administrative-type duties. "I was not very familiar with construction technology, but using the project management features in Vista has been easy. I was able to pick up the software fairly quickly, and it's easy to get around," says Immel. "I can run reports myself without relying on accounting, so I save time and can see exactly what I need to when I need to. I have many favorite reports that I use on a consistent basis and they help me stay on top of purchase orders, materials, contracts, billings, so much – even snapshots of job progress to stay informed and ahead of any problems."

In summary, the made-to-order mechanical contracting business with a company-wide Lean initiative found its perfect fit with contemporary technology that delivers flexibility and usability; so it makes sense that both companies focus on innovation and best serving customers' needs.

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