

INDUSTRY CASE STUDY

CONSTRUCTION

MULTI-DIVISION CONTRACTING

Unlocking **\$860K** through
financial visibility

\$180K

UNBILLED PROJECT

\$680K

PPP FUNDING

\$860K

TOTAL UNCOVERED

0

NEW HIRES NEEDED

Unlocking **\$860K** through financial visibility

A multi-division construction company ran **four separate QuickBooks files** and couldn't see itself as one business. Simpatico connected the data — and uncovered **\$860,000 they were already owed**.

CLIENT	SECTOR	ENGAGEMENT	VALUE UNCOVERED
Multi-division construction company	Construction	Financial data integration & reporting	~\$860,000

THE CHALLENGE

Four divisions, four QuickBooks files, no clear picture

A construction company operating across residential, commercial, roofing, and glass divisions couldn't see how it was performing as a whole. Each division ran its own QuickBooks file, so the financial data was scattered across disconnected systems — and the gaps were costing them more than they realized.

Disconnected systems

01

Four divisions, four separate QuickBooks files. No single place to see the company's true financial position.

Fragmented reporting

02

Separate reporting processes across business units made it slow and painful to assemble a company-wide view.

Limited visibility

03

Leadership couldn't easily see overall performance, so decisions were made without the full picture.

About to over-hire

04

The company was considering hiring an additional finance employee just to assemble reports — solving a data problem with payroll.

Disconnected systems, turned into one connected platform

As the company's Managed Intelligence Provider, Simpatico connected its financial and operational data into a single unified reporting environment — and surfaced the opportunities hiding inside it.

1

Discovery & design

We worked with leadership to map how financial data was tracked across divisions and where the reporting gaps were — across multiple QuickBooks files, project-tracking spreadsheets, and separate reporting processes.

MAP THE GAPS

2

Automation & integration

We connected the multiple QuickBooks systems and project-tracking spreadsheets into one place, then built clear, real-time dashboards giving unified visibility across every business unit.

ONE SOURCE OF TRUTH

3

Business alignment

The new system helped leadership understand company-wide performance, cut manual reporting, and — most importantly — surface financial opportunities that had been invisible across the divisions.

INSIGHT, NOT GUESSWORK

THE RESULT

\$860,000 in opportunity, hiding in plain sight

With real-time visibility, the company quickly uncovered money it was already owed — opportunities that had gone unnoticed for as long as the systems stayed disconnected.

\$180K

recovered
unbilled completed project

\$680K

secured
finalized PPP funding

\$860K

total uncovered
previously hidden

0

extra hires
no new finance staff needed

HOW THE MONEY SURFACED

Two discoveries, \$860,000 recovered

During early analysis, Simpatico spotted a project that had been completed but never invoiced. The company issued the invoice and collected **\$180,000** in revenue it had simply overlooked.

A deeper review then surfaced an incomplete PPP loan process that had never been finalized. After completing the remaining paperwork, the company secured **\$680,000** in funding — money that would otherwise have been left on the table.

"The money was already theirs. They just couldn't see it."

→ Completed project, never invoiced **\$180K recovered**

→ Unfinished PPP loan process **\$680K secured**

→ Manual cross-division reporting **eliminated**

→ Extra finance hire **no longer needed**

HOW WE HELPED

What a Managed Intelligence Provider does

Strategic Design

Unified reporting built across multiple QuickBooks systems, so leadership sees one company.

Automation & Scale

Financial and operational data integrated into a single, connected intelligence platform.

Data-Driven Decisions

Real-time dashboards give leadership clear visibility into company-wide performance.

Ongoing Partnership

Continuous improvements as the business grows, with a stronger data foundation each year.

Financial visibility for multi-division businesses, answered

How do you get financial visibility across multiple QuickBooks files?

You connect them into one unified reporting environment. In this case, a construction company ran four separate QuickBooks files across its residential, commercial, roofing, and glass divisions. Simpatico integrated those systems and the related project-tracking spreadsheets into real-time dashboards, giving leadership a single, company-wide view instead of four disconnected ones.

Can connecting financial systems actually find hidden money?

Yes. Once this company's data was unified, the analysis surfaced about \$860,000 in overlooked value — \$180,000 from a completed project that had never been invoiced, and \$680,000 from an unfinished PPP loan process that was finalized. That money was already owed to the business; the disconnected systems were just hiding it.

Do I need to replace QuickBooks to get unified reporting?

No. The company kept its existing QuickBooks files. Simpatico connected them rather than ripping them out, integrating multiple QuickBooks systems and project-tracking spreadsheets into one reporting layer with real-time dashboards. You keep the tools your teams know and gain the company-wide visibility on top.

Should I hire someone just to assemble reports?

Often you don't need to. This company was considering hiring an additional finance employee purely to pull reports together. By connecting the data and automating the reporting instead, they eliminated the manual cross-division work and avoided the extra hire — solving a data problem without adding payroll.

What is a Managed Intelligence Provider (MIP)?

A Managed Intelligence Provider goes beyond traditional IT support to connect a company's systems and turn scattered data into usable intelligence. As this company's MIP, Simpatico unified its financial and operational data into one platform, delivered real-time dashboards for leadership, and continues to improve the system as the business grows.

LET'S TALK

Wondering what's hidden in your own financial data?

If your business runs across multiple systems or divisions, there's a good chance money and insight are slipping through the gaps. Let's find out what unified visibility could uncover for you.

[Schedule a Strategy Session](#)



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