

# MyAssistant

For Sage Timberline Office

## CUSTOMER SUCCESS STORY



## MyAssistant helps GC stay on top of the details and do more with less

Founded in 2003, Stevens Construction was named "Contractor of the Year" in 2007 and "Builder of the Year" in 2006 by the Lee Building Industry Association. Terri Sobeck, Stevens' Director of Administration, installed MyAssistant in June 2008 "after hearing great things about it." She reports:

"We needed to have a program that would alert us of certain situations and let us know of deadlines that were due in Timberline. Timberline software is great, but it doesn't tell us anything unless you go looking for it, so MyAssistant is a perfect solution to automatically let us know when something important happens or is due."

"We use MyAssistant for a lot of things but probably the most important is tracking insurance certificates. It lets us know when those due dates are coming up and when they've expired for vendors. I have a staff member that takes care of insurance and MyAssistant just helps keep them on top of it—it automatically gives them a list of things to go through and check off as they ensure that certificates are up to date."

"On the project management side, MyAssistant lets us know when submittals and RFIs are due, or if there are some deadline dates in meeting minutes that haven't been met. The software will automatically alert us whenever that happens."

"On the HR side, I have MyAssistant tell us when an employee anniversary date is, or when people are coming up on their 90 days of employment so they need to have their benefits started."

"The software is great for letting us know when job cost codes are over budget, and that's critical in what we do, because that's not something we want to learn about after the fact. The sooner we know about it the better—we can address the overage right

away. Getting automatic notifications of over budget cost codes has been a huge, huge, help for us."

"In the future, I'd like to create a MyAssistant Task to help us stay up to date with vendor licensing. I would love to have the system automatically tell us when a license has expired or perhaps they need a license in a particular area and we don't have a record of it."

"MyAssistant has been very simple to get up and running. Changing some of the Tasks as well as a Task's schedule is really easy. I'm the one that sets everything up—I set up who to alert and when, and define what information gets to the staff. It's very user friendly."

"MyAssistant has allowed me to do more with less. I feel like the initial upfront cost of what we spent on MyAssistant is so small compared to the benefits of having the software. It's like another person doing a check of our Timberline system and making sure we have what we need in order to run our business and our jobs. When you think about what the software can do as a whole it's worth much more than its cost."

"It's really like my little assistant—the name is a perfect description of it."

### CUSTOMER

Stevens Construction

### INDUSTRY

General Contractor

### LOCATION

Fort Myers, FL

### INNOVATIVE SOFTWARE DESIGN

Founded in 2004, Innovative Software Design provides products and services that extend the power of Sage Timberline Office. The people behind ISD have more than sixty years of experience at Sage Timberline and are inspired by creating innovative solutions that help businesses be more productive.