








## Situation

The Seer Group is a nationwide roll-up of HVAC Services, partnering with existing brands to achieve their financial goals by growing their businesses and facilitating planned exits that benefit sellers, employees, and customers.

## Challenge

-  The Seer Group is actively looking to grow through partnerships with existing HVAC brands.
-  As part of these partnerships, there is difficulty quickly producing consolidated financials and operations KPIs to monitor performance of the entire portfolio of brands.
-  Each legal entity had its own financial system, operational system, its own chart of accounts, and its own dimensions in which measures performance (class, geography, department, etc.).
-  The team had difficulty getting all the data from disparate systems into one spot.

## Action

-  Once the acquisition is complete, the team from The Seer Group uses the BUCS Connection Hub to establish connections to the target's financial and operational systems.
-  BUCS begins pulling the data and integrating into existing data structure.
-  Financials and Operational KPIs are produced and presented in existing consolidated reporting. Outside configurations (account mappings, class/business unit mappings, etc.) are also populated.

## Result

- 4 Hours**  
from connection to live reporting
- 10 Minutes**  
needed from client to establish connections
- 40 Hours**  
saved every week by automating manual, recurring Excel work

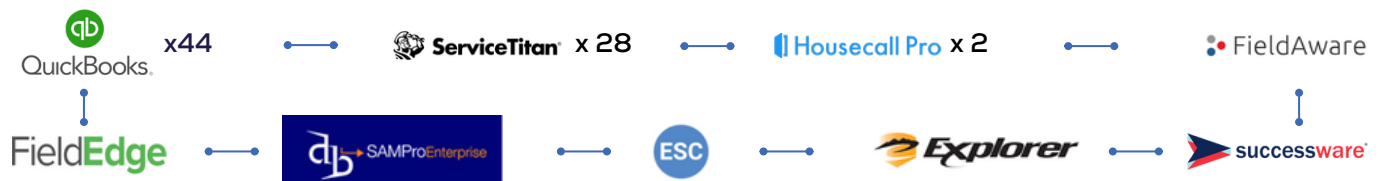


Within 4 hours, we were able to establish a connection and have data flowing into our reporting. The best part was it only took 10 minutes for my team to do their part.

Todd Whitbeck  
CFO



## Systems Integrated



BUCS launched the first version of our platform in 2016 to help mid-market companies improve performance through better information. This idea has blossomed into an end-to-end data management platform used by high-growth organizations, private equity firms, and top professional service firms. They rely on our platform to drive efficiency and increase decision velocity, resulting in value creation greater than 5% of revenue.