

Situation

CopperPoint is an entrepreneurial investment company that specializes in acquiring and investing in plumbing, heating, air, and electrical companies with operations spanning multiple locations.

Challenge



There were time consuming, manual processes to gather and assemble data for monthly financial and operational reporting.



No existing process to combine portfolio companies into consolidated reporting.

Action



Connected to accounting and operational data systems and ran through BUCS end-to-end data management platform.



Provided direct access to a variety of data tables, including BUCS standard operational and financial tables, that can be refreshed at the client's discretion through the BUCS Data Feed into Excel.



Automated monthly financial and operational KPI reporting package.

Result

2 Weeks

from initial connection to Data Feed to automated monthly KPI reporting

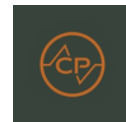
10 Hours

saved manually cleansing and combining data in Excel each month



BUCS has given us access to our data at a level of granularity and speed at which we didn't have before. On top of that, BUCS will save us hours each month going forward in helping us automate our monthly reporting processes. We were impressed at the speed at which the BUCS team was able to connect to and make our data available.

Dom Pica
Head of Corporate Development



Systems Integrated

sage Intacct • sage 100 • qb Intuit QuickBooks Online • qb Intuit QuickBooks Enterprise x4 • ServiceTitan X4

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.