

Chris-Tel Construction Connects Cost Controls and Financial Data Across a Diverse GC Portfolio

Chris-Tel Construction Fort Myers, Florida

Project Types

Service work through complex capital projects exceeding \$90 million

Primary Challenge

Financial system integration, analytics, and scalable collaboration

Chris-Tel Construction is a general contractor firm based in Fort Myers, Florida, specializing in construction management and design-build. The company has a portfolio of capital programs valued between \$70 million and \$90 million that includes new construction, service contracts, building additions, roadway improvements and interior renovations.

Internal teams, subcontractors, design teams and owners collaborate daily around project documents and cost workflows. Without consistent processes and a strong connection to financial systems, information and financial data were managed inconsistently across multiple tools.

It was hard for teams to stay aligned, trust information related to project costs, and see the larger portfolio picture.



The Challenge

As project teams took on greater financial responsibility, Chris-Tel needed financial data from their ERP, Sage, to be consistently available within its project management workflows. Teams needed to review costs and financial information alongside project data rather than in separate systems.

The problem was that Chris-Tel's previous project management system offered limited API capabilities and could not support the ERP integration they required. As a result, financial data and analytics information remained siloed within individual projects, limiting visibility and insight across the broader organization.

Additionally, it was expensive to maintain multiple integrations with associated ongoing subscription fees.

Beyond integration to key point solutions, Chris-Tel Construction needed:

- The ability to tailor workflows to how their teams actually worked based on the specific client and job
- The ability to automatically create financial reports with confidence in cost conversions
- A single system with up-to-date information that internal and external teams can use

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We have a lot of continuing work and a lot of different types of projects. We needed something that could support that diversity without forcing us into a rigid process.”

Jeff Morrow
Vice President of Construction,
Chris-Tel Construction

Why Kahua

Chris-Tel Construction selected Kahua to consolidate document management, cost management, and analytics on a single platform. Kahua's configurable API framework integrated with Chris-Tel's financial systems, avoiding the cost and complexity of maintaining multiple solutions.

"The driving factor was the customization associated with the product," Jeff Morrow said. "Even Kahua's out-of-the-box platform gave us more ability to configure for our needs, and the analytics were a big part of the decision as well." From a day-to-day operations perspective, responsiveness and support were also important.

The company chose the Kahua platform with:

- **Document Management** to centralize and share project documents with internal teams, subcontractors, design teams and owners
- **Cost Management Suite** to manage cost workflows and connect project cost data with their financial system
- **Kahua Analytics** to access reporting and financial insight across projects and portfolios, plus a team of data scientists for support

A Crawl-Walk-Run Approach to Implementation

Chris-Tel Construction kept change management in mind with a phased rollout approach to reduce disruption and allow teams to adopt the platform gradually.

The company started with document management, then added cost management and provided training to internal project managers as they introduced new applications. This crawl-walk-run approach allowed teams to focus on core workflows first, then expand usage over time.

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Communication was a big issue for us before. We needed a partner that would actually respond when we had questions or needed help.”

Mallory Morrow
Document Control Specialist,
Chris-Tel Construction



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Results

Today, this large GC manages documents and cost workflows in a single system used daily by internal teams, subcontractors, design teams and owners.

The team is focused on closing training gaps, as well as establishing consistency in how teams manage their documents and cost processes.

Instead of exporting from Sage and reconciling spreadsheets, teams can now quickly respond to automated reports. They're using the same real-time information in the same system, resulting in more accurate data, and more consistent workflows and approvals.

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I would say 30 to 40 people are in the system daily internally. All of our subcontractors use it, our design teams use it, and in some cases, owners do as well.”

Jeff Morrow
Vice President of Construction,
Chris-Tel Construction

By connecting cost workflows directly to their ERP within a single platform, Chris-Tel reduced manual reconciliation between systems and simplified the way cost data rolled up across projects. They got:

A single source of truth for cost and documents

Chris-Tel now manages document and cost workflows in one system connected to Sage, with internal teams and partners working from the same project and financial information.

Less reconciliation between systems

By integrating cost workflows with their ERP, they have reduced the need to reconcile data between multiple tools.

More confidence in approvals and reporting

Shared access to project and cost data has helped Chris-Tel streamline approvals and get cleaner reporting across their portfolio.



Looking ahead

Chris-Tel Construction is now focused on standardizing document and cost management processes for their service work and large capital project lines of business. The team aims to reduce variation in how projects manage information alongside the ability to account for differences in project size and complexity.

Chris-Tel is working to better align internal project teams, subcontractors, design teams and owners around shared workflows and data in Kahua. The company is also working on training, expanding their use of Kahua Analytics for cost visibility and applying more consistent practices across projects.

Kahua is a key part of Chris-Tel's long-term strategy for managing complex construction work, with the ability to configure new and existing workflows as project requirements, business needs and the world, change.

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After 35 years in the construction industry, we know that proactively managing risk is critical to delivering successful projects.

Kahua Analytics has become our go-to standard for reviewing every project. Through weekly leadership reviews of real-time data, we gain immediate visibility into performance, identify risks early, and make informed decisions that keep our projects on track and deliver successful outcomes for our clients.”

Howard L. Wheeler, II
President, Chris-Tel Construction

Key takeaways

- ✓ **Diverse construction programs require configurable systems**
- ✓ **Financial integration is a critical driver for PMIS decisions**
- ✓ **Analytics and shared visibility support collaboration across stakeholders**
- ✓ **Phased implementation helps teams adopt new workflows incrementally**