

## CLOUD-BASED SECURITY SOFTWARE INTEGRATION

ACCOUNTING AND FINANCIAL MANAGEMENT  
COMPLIANCE  
HUMAN RESOURCES  
OPERATIONS MANAGEMENT  
PAYROLL  
QUALITY ASSURANCE  
TIME AND ATTENDANCE

**W**ithout WinTeam, Jayson Yao believes he would have never landed one of his biggest customers. His company, 50 State Security Service, Inc., was seeking a government contract, and the client required customized billing. “The way that they needed their billing was the most complicated billing we had ever encountered. And because we were on WinTeam, we were able to furnish the detailed billing they needed,” Yao said. “It also had to match up to the biometric reports that WinTeam receives. If we weren’t on WinTeam, we couldn’t have complied with the invoicing.”

Yao, chief financial officer and vice president of 50 State, said his company was able to further cement the contract through an integrated customer self-service portal, which allowed the client to access 50 State’s officers’ schedules. “With the customer self-service portal, it was very easy for us to give them access to scheduling,” Yao said. “Without WinTeam, this would have been next to impossible to provide.”

WinTeam is an integrated, cloud-based software system developed by and for contractors in the building service and security industries. Developed by TEAM Software, it delivers financial, operations, and workforce management components to help streamline business processes and deliver a complete picture of profitability. Companies can leverage shared data from throughout their organization, and because it’s a cloud-based solution, data can be accessed from the office, home, or on the road. TEAM Software currently has nearly 400 clients in the United States, Canada, and the Caribbean,

with hundreds of thousands of end users. TEAM Software is employee owned and focused on customer service.

Many companies choose TEAM Software because of the integration of the various components of its software. This integration helps reduce time and resources required to maintain various independent solutions, makes it easier to extract coherent information and reports from the overall system, and helps ensure compliance more efficiently. “We have everything from not only the operation side of the business and workforce management, but we also incorporate payroll and human resources and then tie it all to the backend, which is the general ledger for financial reporting,” said Jill Davie, TEAM Software senior vice president of client experience. “So having all of that information in one database and one system, where information flows seamlessly from one area to the next, is definitely the advantage of using TEAM Software.”

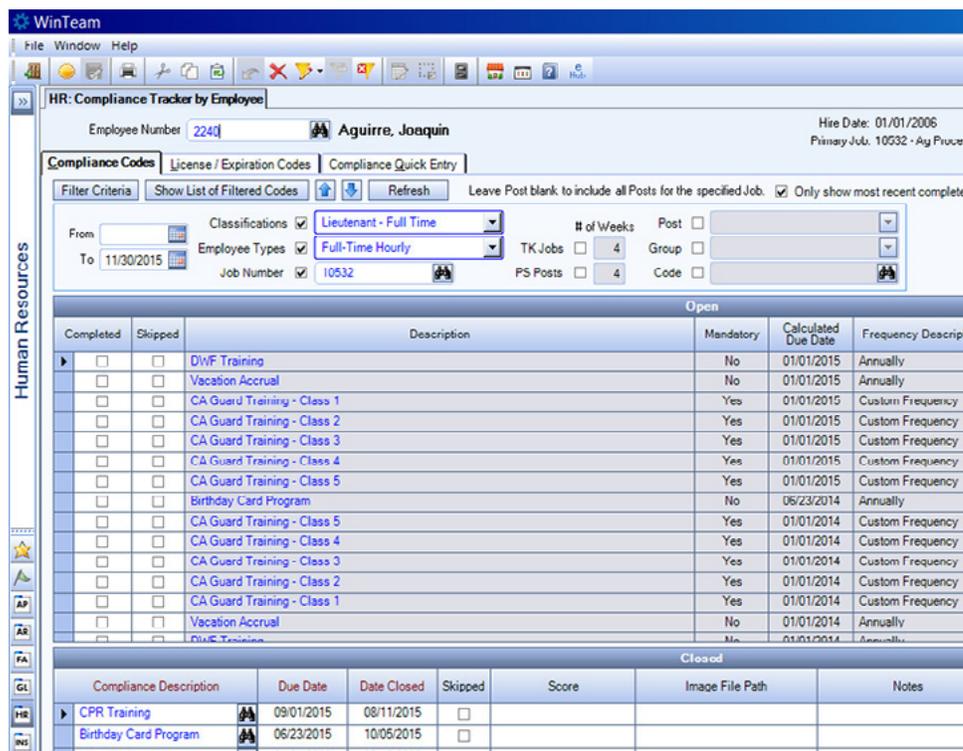
If companies are not using an integrated package like WinTeam, they may be using paper systems, spreadsheets, or unrelated software applications. Those systems may offer individual pieces like scheduling or payroll, but they will not be integrated with the backend general ledger. So then companies must purchase an additional accounting package and figure out how to make the various systems talk to each other. Companies may be working with multiple vendors, facing implementation issues, and struggling with ongoing costs and maintenance.

“WinTeam is focused on security companies, so their scheduling is really strong

for that type of business,” said Betty Ritts, vice president of information technology at AlliedBarton Security Services. “It integrates compliance with it, so many of our officers’ licenses for various state requirements as well as armed licensing is integrated. Also, the scheduling is integrated with payroll and billing, so it keeps it all together. That makes it much easier if you have to go back and audit for a client. And there’s a lot of good bells and whistles to help us to manage the business.”

“We switched to TEAM Software because of the added versatility and added capability,” said Denis Kelly, executive vice president of Sunstates Security. He said his company made the switch in 2008 because of the integrated accounting, payroll, and scheduling functions that were offered, enabling users to run reports and analyze data.

In the end, businesses see a financial gain because they can get a complete picture of their profitability and make better business decisions, especially as they face shrinking margins and increasing competition. “It’s saving them time, making them more efficient, and getting them better insights into their business,” said Scott Gauger, TEAM Software director of sales. “There



The Compliance Tracker tool helps ensure staff assignments meet training and licensure requirements for specific posts.

are a lot of different individual software solutions, but putting them all in a consolidated, integrated package – there aren’t that many out there.”

### Integrated Features

WinTeam offers comprehensive financial and accounting management capabilities and allows companies to manage their workforce effectively with powerful scheduling tools. Companies can save time by creating weekly work schedules from permanent master schedules, then manage exceptions at a glance, like overlapping shifts, overtime, or compliance issues. The compliance tracker tool helps ensure that employees meet job requirements, like special licensing or training. Scheduling information is seamlessly integrated with

accounts receivable and payroll, so companies can bill customers with accurate and timely information. The software also allows companies to track inventory and equipment issued to employees or jobs and monitor supply levels and costs.

WinTeam includes human resources tools to help companies administer insurance benefits in compliance with Affordable Care Act (ACA) employer regulations. Because timekeeping and human resources data is contained in one system, companies can easily determine employee benefits eligibility based on hours worked. In addition, all benefits and eligibility data is captured and available for ACA reporting and compliance.

Customers appreciate the many different features of WinTeam. For example, Barry Williamson, chief financial officer of GMI Integrated Facility Solutions, said his company finds the integrated system makes job cost reporting easier. "You can run an onscreen job cost on your computer, and there are drill downs to the source of every single number. So if accounts payable is involved, you drill down and see the accounts payable invoice that makes up the entry. If it's revenue, then you can drill down to the customer invoice that makes up the revenue. You can drill right down to

the daily time sheet through payroll to see where those numbers are coming from. It's the same with inventory," Williamson said. "Without even getting out of your chair, you can see every component that makes up the revenues and costs to see where you're

missing the budget or where you're performing well against budget."

WinTeam's features work especially well in the security industry, where scheduling and licensing play such an important role. Companies can use the system to make sure officers are where they need to be at the right time and that they're qualified for the job. Plus, the integrated mobile features mean information from WinTeam can be used by supervisors and officers in the field, in real time.

The personnel scheduling feature allows companies to track where they need to place officers based on their clients' needs. In addition, workforce tools help managers ensure officers report to the site. With integrated time and attendance features, employees can clock in via telephone, biometric time clock or on their mobile device, and

that timekeeping information is updated back in WinTeam from the field. Plus, the system will post alerts when officers do not report to duty. "They get a bird's eye view of the entire operation, including all shifts

---

**"They're very good about reaching out to clients for their input and brainstorming through things. They stay on top of new things as they relate to payroll regulations, such as the ACA. And they let their customers know, so they're a good source of information for their clients."**

*Betty Ritts  
vice president of  
information technology  
AlliedBarton*

---

that are currently active or will be active in the next hour,” said Mike Straub, TEAM Software senior vice president of software development. “They’re able to see all of the activity and all of the exceptions as they happen.”

Compliance has been a core component of WinTeam for more than 15 years. Companies can enter requirements at the job level, and then monitor whether employees have the proper licensing and training. When companies schedule employees for a shift, they can check to see if their licensing has expired. “The system will either warn or even not allow people to be scheduled based on that compliance,” Straub said. In addition, a compliance alert engine will allow companies to notify officers when licenses are coming due, so that companies can be proactive in making sure their officers have all that they need to be put in place.

Kelly, from SunStates Security, said TEAM Software has helped his company track compliance and training for its employees. “We have several hundred courses available for our people, from initial training to ongoing learning to customized courses,” Kelly said. “When someone takes a course, the challenge is tracking their results and ultimately seeing how they’re progressing as an employee. All of that information flows into WinTeam, so we can see everything from their initial background checks to when they’ve been hired and all the training they’ve completed.”

The mobile features offered by TEAM also work well in the security industry, allowing supervisors to access the information in the field so they can make good

decisions about scheduling employees or finding the appropriate kind of employees to work. TEAM Software’s employee and customer self-service solution can be used on Android and Apple devices, with a downloadable app. Everyone in the company, from supervisors to employees, can use the app to see their schedules or retrieve their paystubs. And because most people are accustomed to using an app, it’s user friendly.

“With our mobile and web offering, we’re really trying to penetrate the entire organization of our customers. We want to bring our solutions all the way to the security officers, so the officers can benefit from receiving their paychecks through a mobile device,” Straub said. “We can even bring the technology to our clients’ own customers. They have customers who need to be able to access invoice information or other various operational types of information, so we’re continuing to improve our customer self-service capabilities so our customers can provide more information to their customers.”

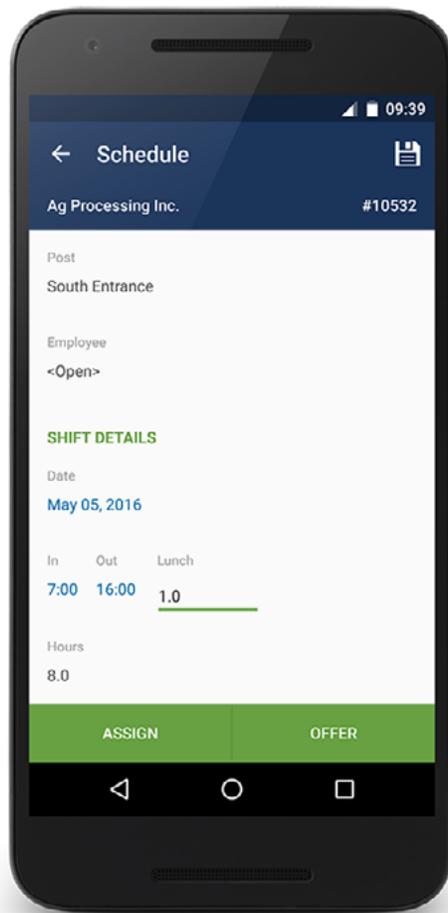
Kelly said his company relies heavily on the mobile application, which allows managers to do quality assurance checks, compliance reports, and inspections in the field. Because officers have access to their schedules and paystubs on their mobile phones, those mobile features save time, which can be put back into improving customer service and growing the business.

### **Roots in the Security Industry**

TEAM Software was formed in the 1980s in Omaha, Nebraska. It all started when a building service and security contracting

company was hunting for an integrated, industry-specific management system to help organize operations, streamline accounting processes, and provide insight into profitability. The company couldn't find any existing solution that could do exactly what it wanted, so it put together a small team to build one of its own. Six years later, the team had developed the prototype for what is now known as WinTeam. Frank Labedz, the CFO and software project lead, realized that this unique solution could make a significant difference for other businesses, so he started a new company to offer the solution to other contractors.

Some 25 years later, TEAM Software still remembers its roots in the security industry. "We tailored the software around the security business, where what drives everything is your labor, your hourly workers. That drives your billing and your payroll, your margins and profitability," said TEAM Software's Davie. "So focusing our system around that piece of the software gave us an advantage in speaking the language of these companies — understanding that if you manage your labor and your workforce, that will drive your profitability and your success."



Integrated mobile features provide real-time information to officers and supervisors in the field.

Davie said TEAM Software actively promotes its product in the security industry, attending trade shows regularly and connecting with its customers face to face. TEAM Software also hosts its own annual conference for clients.

GMI's Williamson said his company has taken advantage of the networking opportunities offered by TEAM Software. "TEAM's yearly conference has evolved from a meeting that was basically sitting around in a hotel room to a large hotel gathering with hundreds of people. It's come a long way," Williamson said. "That environment is great to meet with people who are doing what you are

doing and who have the same challenges as you do. It's a good opportunity to talk with your peers."

TEAM Software stresses not only its background in the security industry, but also its focus on customer service. The company became employee owned in 2007, with each employee owning stock in the company. The company was looking to reward its employees for all their hard work and wanted its employees to have a stake in the success of the company. And because they have a vested interest in TEAM Software's

success, they understand that they are only successful if their customers are satisfied.

“One of the key things we hang our hat on is great customer service, providing our clients with appropriate answers to their questions in a timely manner and following up on their needs,” TEAM’s Gauger said. TEAM Software offers a dedicated support department that answers customers’ calls, an implementation and education department that helps new clients, and ongoing training of existing clients for new products as they are brought out.

Ritts from AlliedBarton said TEAM Software listens to its clients. “Staff are very good about taking feedback and suggestions from their clients, especially when they’re going to change things or add new functionality. They’re very good about reaching out to clients for their input and brainstorming through things,” Ritts said. “They also stay on top of new things as they relate to payroll regulations, such as the ACA. And they let their customers know, so they’re a good source of information for their clients.”

The fact that TEAM Software is employee owned results in other benefits to its customers as well. “Our customers in the security industry know turnover and costs related to turnover. So being employee-owned reduces our turnover, which increases quality and efficiency and our ability to deliver,” said Straub. “We’re able to retain an amount of knowledge. Because that knowledge is not walking out the door every two or three years, we’re able to be a lot more efficient.”

By promoting a culture of strong customer service in the security industry, TEAM Software employees build strong relation-

ships with their clients. “They’re more than a vendor, they’re a consultant,” Yao said. “They’re a resource that I use, so it’s not only about how their software can help us. They have their finger on the pulse of the industry, so I can get feedback from them on the trends in the security industry.”

### Future Plans

Providing good customer service also means keeping abreast of changes in technology. TEAM Software made an early move to the cloud in 2001. While customers used to receive software and install it on their own computers, now most new businesses use the cloud, and more and more customers are coming to expect that type of service. The cloud makes it easier for companies to get on board, since they no longer have to purchase equipment like servers, install a network, and get everything up and running.

TEAM Software will continue to expand the technological capabilities of its software. “We’re on the cusp of bringing all that technology to a more central unified technology, meaning bringing our Windows application forward to be more of a Web-based solution,” Straub said. “That’s where our future belongs: trying to bring our entire set of platforms together as one suite of offerings so that it’s a more of a seamless and unified solution to all our customers.”

The company will also respond to the changing landscape, as the security industry sees more consolidation. “There are a lot of mergers and acquisitions happening,” Davie said. “Mid-size companies feel that they can market themselves to an acquiring company because they use our products.

Because we do have three of the top five largest security companies in the industry, some companies have felt that using WinTeam gives them an advantage in selling their business because they can integrate more seamlessly into the buying company if they use WinTeam as well.”

Davie said TEAM Software will continue to seek opportunities in the security indus-

try and feels that there is room for growth. “It’s important for people to know we’re committed to the industry,” Davie said. “While we may consider branching out and offering our software outside of our niche markets down the road, we do not plan to turn our back on the security industry or leave that market in any way.”



TEAM Software, Inc. develops cloud-based business solutions designed for contractors in the building service and security industries. Our fully integrated solutions range from award-winning financial, operations and workforce management, to time and attendance, to employee and customer self-service portals.

<http://teamssoftware.com/>