

## Building Smarter: Resia's Shift to an AI-First Model for Rapid Real Estate Expansion

D365 Business Central | Power Platform

### Business Overview: Vision for an AI-First Frontier Firm

Resia is a pioneering real-estate development company focused on designing, building, and delivering high-quality, attainable rental housing across the United States. By leveraging modern building methods and an integrated approach spanning land acquisition, design, manufacturing, and construction, Resia brings multi-family communities to market with speed and efficiency.

As the company rapidly scaled its geographic footprint and portfolio, it recognized that its legacy infrastructure created constraints around data visibility and operational coordination. To sustain momentum, Resia prioritized building an AI-First digital backbone capable of streamlining end-to-end operations, rather than settling for incremental, traditional ERP improvements—setting the stage for a frontier-level transformation.

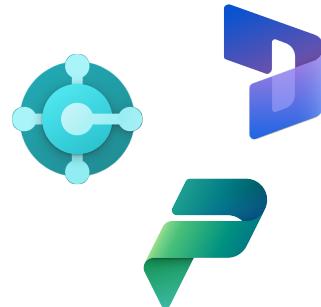
### Challenges Limiting Frontier Potential

To become a frontier firm, Resia first had to overcome a fragmented landscape that obscured workflows and hampered innovation.

- **Complex, disconnected systems.** An over-customized SAP HANA environment, combined with disparate applications like ResMan, Coupa, Kyriba, and Global Shop, created a fractured technology ecosystem. Limited data flow between these tools led to fragile integrations and unreliable insights.
- **High costs and rigid infrastructure.** The existing landscape imposed a high burden of annual licensing costs and expensive API maintenance. This fragmentation increased operational complexity and support dependencies, diverting resources away from strategic growth.
- **Manual work obscuring workflows.** A heavy dependency on manual processes across Finance, Procurement, and Project operations increased the risk of data inaccuracies and delays, preventing the visibility required for true digital transformation.

## Architecting the AI-First Operating Model

Alletec partnered with Resia to deliver a roadmap for frontier readiness, replacing disjointed systems with a unified, intelligent platform centered on **Microsoft Dynamics 365 Business Central** and the **Power Platform**.



### Make the Invisible Visible: Unification and Consolidation

The core of the transformation was establishing a single source of truth, eliminating the data fragmentation that stifled growth and visibility.

- **Application Consolidation:** Alletec replaced the over-customized SAP HANA environment for core finance and accounting with Dynamics 365 Business Central. This established a unified platform covering Finance, Procurement, Projects, Approvals, and Reporting, drastically reducing system fragmentation and simplifying maintenance.
- **Simplification of the Technology Landscape:** The project eliminated dependency on siloed applications like Coupa by leveraging native Business Central capabilities, enhanced with custom Power Automate flows for multi-level approvals across Procurement and Finance. This centralized key processes and reduced the dependency on external, costly systems.
- **Harmonized Processes:** Business processes were standardized across Construction, Finance, and Procurement to improve cross-department collaboration. This involved removing unnecessary steps and dependencies previously required in the rigid SAP HANA system, migrating employee expenses, G&A/soft costs, hard costs, and payment processes, and implementing clear system validations to enforce compliance and consistency.

### Treat AI as Infrastructure: Building Intelligence into the Core

Alletec ensured that automation and intelligence were not bolt-on features but were built into the platform's core to support human-agent collaboration.



**Unified Data:** A Common GL Uploader Tool and Power Automate flows were developed to standardize and streamline data entry from external systems like ResMan, ADP, and GSS into Business Central, ensuring high data integrity and accuracy for upstream analytics.



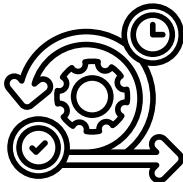
**Enhanced Financial Control:** Strategic integrations were established, including a repurposed Kyriba integration that supports accurate bank reconciliation, ZBA processing, and financial data exchange across entities, all while avoiding additional development costs.



**Microsoft Fabric & Power BI:** The solution tightly integrates Business Central with Microsoft Fabric to enhance analytics and provide real-time visibility into financials, projects, and costs, fueling data-driven decision-making.

## Operate in Perpetual Beta: The Hybrid Agile Approach

Adopting a **"Frontier Firm"** mindset, Alletec implemented a Hybrid Agile Implementation Methodology to ensure the solution evolved rapidly and aligned perfectly with Resia's dynamic business needs.



**Iterative Delivery:** Moving away from rigid, "big-bang" approaches, the model utilized sprint-based, iterative delivery.

**Continuous Validation:** The Deviation Document and accompanying Test Cases served as the definitive baseline for each development cycle. Every sprint commenced with the detailed review of deviation requirements, system configuration addressing those requirements, User Acceptance Testing (UAT), and formal sign-offs. Continuous, close collaboration with the Product Owner ensured rigorous validation of the deviation fixes and guaranteed the resulting solution accurately and quickly aligned with evolving business requirements.

## Strategic Integrations Enabling Seamless Workflow

The transformation successfully connected formerly isolated systems, creating a seamless, automated flow of project and financial data.

**Procore ↔ Business Central:** A robust integration framework ensures project, WBS, hard costs, retainage, and invoice data are synced seamlessly from Procore to Business Central, with payment information synced back to Procore, closing the financial loop.

**Kyriba → Business Central:** The existing Kyriba integration framework was successfully repurposed for Business Central, supporting accurate bank reconciliation and ZBA processing without incurring new Kyriba development costs.

## AI Innovations Enabling Frontier Capabilities

Resia's transformation unlocked advanced capabilities that prepare the company for scalable, human-led, agent-operated workflows.



**Copilot Productivity and Automation:** AI-driven automation and Copilot capabilities have been introduced to dramatically improve efficiency in key areas like bank reconciliations, data analysis, and reporting.



**Actionable Insights:** By integrating seamlessly with the Microsoft ecosystem (including Outlook, Teams, and Azure), Resia has democratized information, streamlining approvals using **Power Automate for workflow automation**, and enhancing analytics and reporting through **Power BI**.

## Impact & Outcomes

Resia has moved from a fragmented legacy environment to a unified, intelligent platform, positioning itself to join the ranks of frontier firms.

- **Unified and intelligent operations.** Multiple fragmented systems were consolidated into a single digital platform, improving process flow and data integrity across Finance, Procurement, and Projects.
- **Cost optimization and ROI.** Resia eliminated high licensing costs associated with SAP and Coupa. By removing the need for expensive SAP-specific consultancy and streamlining the technical stack, the company is now **realizing annual savings of nearly \$1 million.** The strategic value assessment projects that these savings will offset the implementation investment within the first year, with recurring savings from Year 2 onward.
- **Productivity acceleration.** AI-driven automation and standardized workflows have reduced manual work, allowing teams to focus on high-value tasks.
- **Stronger User Experience.** The shift to a more intuitive platform has improved the user experience, fostering better collaboration and faster adoption across the organization.

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*Alletec understood our business and created a solution aligned to our scale and growth. We were impressed by their vertical experience, D365 BC expertise, and ability to simplify complex ERP transitions.*

**Juan Mojica, IT Director, Resia**

## Alletec: The Catalyst for Frontier Firms

Alletec was selected for its deep expertise in the EPC and construction industry and its ability to transform complex legacy environments into unified, AI-ready platforms. Beyond consolidation, Alletec established a data foundation that prepares Resia to leverage advanced analytics and AI-driven capabilities for future growth.

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