

Shannon Staley & Sons streamlines job costs and saves 50+ hours a week with PEX



About Shannon Staley & Sons

Founded in 2013 in Pittsburgh, Shannon Staley & Sons has grown from a small staffing operation into a full-service construction company specializing in residential remodeling, property management and staffing support for national builders. With a workforce that fluctuated between 30 and 100 employees, the company prides itself on flexibility, craftsmanship and a strong culture of teamwork. As the business scaled, the team needed a more efficient way to manage job site spending and material purchases. Their existing credit card setup with PNC and Capital One caused delays, blind spots in job costing and unnecessary administrative work. They needed a platform that could provide visibility, enforce spend policies and adapt as quickly as their projects.

ELIMINATING CARD HANDOFFS AND MANUAL RECONCILIATION

50+ hours saved per week

REAL-TIME EXPENSE VISIBILITY

\$100K+ in project margins protected

SPEND RULES AND AUTOMATED REPORTING INTO QUICKBOOKS

30 weekly admin hours eliminated

“PEX completely changed how we manage job costs. We no longer waste hours chasing receipts or meeting to hand off cards. Everything is in real time, and we can forecast job margins with confidence.”

David Flores, HR Manager, Shannon Staley & Sons

The challenge

In the early years, Shannon Staley & Sons relied on a mix of PNC and Capital One business credit cards. With only two cards shared among seven project managers, the team spent hours driving across Pittsburgh just to exchange cards. To fix this, leadership issued multiple bank cards but that created new challenges: managing one large credit account, chasing receipts and reconciling material costs after the fact.

Managers juggled spreadsheets, chased missing receipts and dealt with delayed charges, making it nearly impossible to know if jobs stayed on budget. Occasional misuse for non-job purchases highlighted the need for stronger controls, while large material charges sometimes appeared days later, causing unexpected losses when jobs closed. The team needed a flexible system that provided real-time visibility, spending controls and an easier way to manage materials across dozens of job sites.

The solution

Shannon Staley & Sons adopted PEX Visa® Prepaid Cards, giving foremen and van drivers their own cards with built-in spend controls. These controls prevented misuse, cards could be limited to gas stations or building supply merchants, while still giving managers flexibility to keep projects moving.

With PEX's mobile app employees snap photos of receipts on the spot, tag them to the right job and upload instantly. This eliminates hours of receipt chasing and makes weekly job cost reviews far more accurate. Real-time transaction data also allowed the leadership team to forecast margins and adjust strategies before projects went off track, allowing them to save over \$100K over time.

The ability to instantly issue, fund and reassign cards gave Shannon Staley & Sons the flexibility to scale up or down with seasonal demand and saved them 30+ admin hours. Whether onboarding a new sales manager or promoting a foreman, PEX made it possible to provide day-one purchasing power without waiting for traditional bank approvals.

Key impacts included:

- Eliminating 50+ hours of wasted time each week previously spent exchanging cards and tracking receipts
- Saving thousands of dollars in job costs by ensuring material charges were visible in real time
- Enabling tighter job forecasting and margin control with weekly cost reviews powered by PEX data

The results

By implementing PEX, the Shannon Staley & Sons finance team significantly improved its financial efficiency via:

50+ hours saved per week

collectively across project managers by eliminating card handoffs and manual reconciliation

\$100K+ in project margins protected

over time through real-time expense visibility

30 weekly admin hours eliminated

with spend rules and automated reporting into QuickBooks

