coactive

How Coactive helped a global engineering firm move from their paper reporting system to an automated qualification process

CASE STUDY

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About Coactive

Coactive builds innovative and intelligent business applications on our proprietary software development platform using rapid application development workflows and technology.

www.gocoactive.com

> **"** Our people eat data for breakfast, lunch and dinner. It's easy to have an app that just gives us check boxes. The Coactive app gives us the flexibility we couldn't find from out-of-the-box solutions or anything off the shelf. It gives us automation and then helps managers set up actual conversations with new agents. **"**
> **– Director of HR**

The Company

The client is a global partner providing professional services to enhance operational performance and reliability. With extensive experience and detailed knowledge, from the earliest stages of projects to the decommissioning of a facility. Their technical and project management expertise allows them to meet a wide range of requirements and overcome a broad range of contingencies.

The Challenge

Paper cards weren't working in the 21st century

New hires must go through a qualification process so they can begin client projects with a baseline knowledge of information.

Early on it was done with physical paper cards. More recently it was migrated to SharePoint, but it still must be printed off, signed by a manager and then sent to HR.

A challenge for managers was not having one place they could go to check which qualifications were completed. It's important for managers to track their new agents and help finish qualification tier one and tier two in a defined amount of time, as well as coach and work alongside them.

"If that doesn't happen, and managers don't have easy access or if they have to email back and forth to find out what new agents have completed, they end up waiting for responses, which eats into the defined timeline for qualification completion."

INDUSTRY | Engineering and commissioning consultancy

LOCATION | Global

EMPLOYEES | 450+ globally

CHALLENGE | Changing an out-of-date paper qualification system

SOLUTION | Application that automates the unique structure of the agent qualification process

RESULT | A streamlined qualification application integrating checkpoints that also trigger conversations between managers and agents

They wanted an application that they could go into and check if new hires were done with their qualifications or see what dates they needed to be completed.

"They have a month to complete the first tier and six months to complete the second tier. We can still send them to a client before this is done, but clients have expectations and want the assurance that our agents will know the baseline information."

They wanted to have a virtual way to check that qualifications were done and signed within the specified timeframe

The Solution

Automating the qualification process and starting conversations

"We can automate these items which helps with efficiency."

They worked with the Coactive team to turn a once-paper-system into an application that was easily accessible to managers and allowed new agents to work through qualification tiers and notify managers when sign-off was needed.

"Managers look at qualification due dates in the app, new agents can then work with their person in the field instead of waiting for the training manager to inform them of dates."

Instead of waiting for "cards" to be downloaded from SharePoint and signed by managers, the developers

worked with the agent-manager specific relationship to create checkpoints and notifications for qualifications.

To help reduce follow-up time between managers and new agents, managers can review information in the app and determine where drop-off occurred and follow up to get the agent back on track.

"If someone doesn't do their qualifications, and we start to see performance issues, we can go in, find that they didn't get their quals done in time, see a pattern and fix timeline or sign-off inconsistencies."

The Result

As a unique application to develop, they want the process automated, as well as trigger conversations between managers and new agents. As with any training, it's important to have human interaction integrated into the process

"We don't want to take away face to face and human interaction. Instead of signing off on the paper cards, agents can check off tier completions in the app which then sends a notification to a manager or director signaling they're ready for a conversation; for example, setting a meeting to talk through safety processes."

Instead of having to sign-off on a physical card, the Director can go into the app, check off his name next to the qualification meeting, allowing the agent to move to the next tier.

Eliminating the back and forth emails, as well as printing qualifications from SharePoint, means agents can move through their qualifications and sign-offs without delay.

Ready To Build A Custom Application That Solves Your Critical Business Needs?

We're excited to make it happen.

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