



How Coactive helped engineering consulting service create a centralized one stop solution to resource planning

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



“ We needed a better way of tracking personnel; where they were working geographically, what projects they were working on, their specific skill sets and qualifications. It had to be seamless and give visibility across our diversified geographic worldwide workforc. ”

– Keith W.
Director of Midwest Operations

The Company

The client has shepherded strategic projects for some of the highest profile companies in numerous regulated industries. Their portfolio includes scope, range, and complexity of projects that have brought to successful conclusions, delivering over half a billion dollars in services for hundreds of clients across thousands of projects, ranging from under \$1,000 to over \$30 million.

They've allowed us to share their story on the condition of anonymity. Client names have been changed.

“Things change rapidly sometimes by the minute. The data needs to be accurate and up to date to allow management teams to see exactly what our resources are doing and pivot on business decisions quicker.”

The Challenge

Defaulting to spreadsheets had its limitations

When {firm} needed a talent pool outside of their region, there wasn't a unified file, location or solution that showed all the company's resources, their current assignments or projected future projects.

“I'm not getting solid information as rapidly as needed in order to make business decisions.”

Each regional manager had their own methodology to keep track of their project employees. Most just defaulted to a spreadsheet, which had its limitations.



"We have almost 500 people across the globe and we need to have a better way of tracking employee locations and project statuses."

Managers were not only picking from the same talent pool for new project in each area, they had to do a lot more leg work in terms of emails and phone calls questioning whether the files had the most current data.

No access to management's project plans would cause inaccurate decision making and bogged down communication.

"If we placed the wrong person then we have to make a change later, which was costly to us and our clients."

It also delayed project proposals, which had tight timelines. It became one more hassle and made it more difficult to meet project staffing timelines, which then reduced opportunity costs.

"With the average proposal about \$50,000 across the organization...missing out on projects because of delays can add up."

The Solution

The app helped get the right person for the job, faster

"I'm sure there are other solutions out there, but we're happy we chose Coactive because it was constructed knowing our business model and how we do business. The Coactive developers were able to tailor the app to our organization, as well as to the specific industry terms we use."

A mock account was set up initially to test timing, which is critical when staffing projects.

The current resources were already identified, so another big data import wasn't needed as developers were able to utilize the existing CRM systems.

"The new app could draw metadata right out of excel spreadsheets to get us started."



Since timing and staffing are critical to projects, there was a concern if people were going to really use this or not? Manager's had their own way of doing things which can be hard to change.

The good news was people were onboard and willing to continue to improve usage going forward.

"We can explore options we didn't know were available. As we grow and new people are hired, we can highlight their strengths and areas of expertise making them visible throughout the company."

Small details, such as adding a quick search using tags, calls up the right expert a manager needs for a project, identifies their skills and availability. The manager can then write a proposal that delivers the solutions to clients faster.

"I think it makes us more diligent in tracking and maintaining data. We've been more active in maintaining the data and realizing that everybody is now looking at it."

They rely on correct and up-to-date data. Given that things change rapidly, sometimes by the minute, this allows the management team to quickly see resource activity and pivot on business decisions quicker with

the app in place. With the old way of doing things, this wouldn't have been possible.

The features on this app also give the company the capability to understand the talents and the skill sets at a deeper level. They didn't anticipate the ability to have this kind of function built in, which is highly impressive to them.

"I didn't expect this kind of data to be available, and thought we had to go to the next plan. But were able to work with our developers to add a feature that lets people add their interests, location desires and ever types of project they want to work on. This gives us insights at a personal level so we can better match the skill set with the need."

The Result

Two-way visibility means faster decision making

With two-way visibility in terms of business leads, planning, mapping resources, projections and insights about the resources themselves, the managers have information to make key business decisions faster. The resources also have input into projects, their availability and qualifications.

With the tagging feature, the field managers can search across all channels outside the current talent pool, see what projects are going on, who fits the need or when

the right resource becomes available. Then it starts the internal negotiation to acquire that specific resource for the project.

"It's fostered better communication by opening up a dialogue with managers and employees interested in the posted opportunity. There's no unnecessary downtime, which means people have project work at any given point in time."

Proposals are turned around faster as changes and updates can be seen instantly. No more emailing back and forth or phone calls to determine the requirements.

"Information is in front of everyone at the same time, live, and available for use in decision making. That's very beneficial and remains probably the best feature on the app today."

It makes the job of the resource managers easier by going to one source for information.

If something doesn't appear correct, they can quickly address the questions and update resource data allowing for quick employee placement.

"We now have a centralized one-stop solution to resource planning."



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