coactive

How Coactive transformed an engineering firm's data-gathering system from a whiteboard to a data-rich Resource Tracker app

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 core business is providing services to various customers at their locations. We have teams spread out all over the world who are working relatively siloed. They're not going to the same office every day. They're transitioning from one customer to another customer. It makes keeping up with our resources difficult. This tool helps us know when somebody is rolling from one project so we can put them on another."
>
> **– Rich S.,** Project Manager and Global Safety Officer

The Company

The client is an engineering firm that performs the start-up, operation and maintenance of systems and equipment in the life sciences industry, including system and plant commissioning and turnover. Managing projects up to $2M and leading groups of agents ranging from one to over 50 persons.

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

"We now have a way of tracking resources more efficiently; it helps get the right person in the right place at the right time."

The Challenge

One person and a whiteboard

When Regional Project Managers needed a resource to fill a project position, they would report to one person, the Resources Manager. They would give a description of the skill sets and qualifications to the Resources Manager who would then start the search for the right employees for the project.

The Resources Manager was responsible for correlating all the opportunities and trying to match skill sets, qualifications and personal desires of each employee to the project requirements.

"We used to have a young lady whose job this was. It was one person doing all the work of putting the resources together."

INDUSTRY

Engineering Consulting Services

LOCATION

North America

HIGHLIGHTS

8 Regional Managers

337 employees

1 Resources Manager using a whiteboard as a data-gathering system

RESULT

Visibility into all resource profiles

Regional Manager accountability

No Second-Guessing

With 8 Regional Project Managers, who each have up to 50 employees per project, it's roughly 340 people to manage.

"She had a whiteboard in her office."

This was not only problematic it also wasn't efficient or secure. One wrong brush up against the whiteboard and the resources would be "wiped" from the project.

"We chose to automate the process rather than have somebody dedicated because she has a lot more talents than just resource availability."

Choosing to automate meant that each Regional Manager kept a roster on a spreadsheet and was responsible for manually entering the 40 or 50 people they managed; their skill sets, qualifications and their project timeline. That information would be emailed back and forth to communicate activities.

The Solution

Automating a manual process meant thinking outside the box

The Coactive developers rolled out a basic Resources Tracker and instructed each Regional Manager on how to use it.

"I provided feedback to the team and we began shaping UI and additional functionality."

Creating an app like this meant thinking outside the box. The managers and developers met every other week, doing a sprint to add functionality. The team would review, work out any bugs, then implement the new functions. This took a lot of stress, pressure and time off from having to manually communicate through emails.

There will always be a component where managers need to manually input data into the tracker; either projects don't end on time or staff gets extended on a project, all of which pushes out transfer dates and impacts their ability to go to the next assignment.

With the ability to customize the app, add new features in the future and optimize the process, managers are more up to date on team operations.

"It's putting that information in one place. And so much better than the whiteboard process."

The Result

Visibility, accountability and no second-guessing

The whiteboard was visible to one person. This app gives visible to everybody.

Every manager can see which stage and function employees are performing when on a project. They are also notified when new projects open up that require specific skill sets. Managers are now about to see all their resources activities and update in real-time, which encourages accountability.

With the ability to customize, they also built resource profiles that give managers the function of automating resumes and updating personal and qualification information on a regular basis. The resumes can then be easily forwarded to new client projects.

"Having employee skill sets instantly available on the app is much better than a word document that has to be updated and emailed back and forth. And what if you download the wrong one? Here we're updating the resume or the profile in real time. That's a huge improvement."

Regional managers are also able to generate a resource request. The app will then automatically send an email to the person or people whose profile matches the request. They know who fits certain job requirements as well as their availability. If a specified employee is not readily available, they can work with their direct supervisor to switch with another resource so both employees are aligned with a project's required skill sets.

"It helps get the right person in the right place at the right time. And helps us satisfy personal skills and desires, placing them in projects they are best-suited for."

Everyone can see the resource profiles and can update the app in real-time. All information and technical terminology are consistent across the board. There's no second-guessing.

App Development

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

We're excited to make it happen.

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