Workflow Process Tracking for A Large Engineering Firm

Standardization and identification of workflow processes leading to powerful Management Reporting

CLIENT CHALLENGE:

Company X is a leading engineering, consulting, and technical services firm serving hundreds of investor-owned, cooperative, and municipal utility clients across the Country. Each of their Clients has a team within Company X that is tracking and monitoring all work activity. In order to manage this activity, the different teams were utilizing siloed Access Databases, spreadsheets or individually created Quick Base Applications. Data was not easily accessible as it resided in each individual owner or Clients system and was then manually reported to Senior Management. There was no practical way for executives to track progress or see what obstacles stood between initial Work Order/Job Creation and Completion. Each of their Clients has its own set of processes and practices which made a one-size-fits-all software package impractical to implement. Each of their Client Teams had developed its own process, with little to no collaboration between Teams. The process for communicating Work Order/Job status was frustrating, tedious, and time consuming.

MCFTECH SOLUTION:

Using Quick Base, MCFTech created a cloud-based, CORE Workflow Tracking solution. The CORE solution included core functionality common to all teams. After a successful initial deployment with the Dominion Team, the Company X and MCFTech Quick Base deployment team held a discovery and jumpstart event for each client team to determine what changes or additions each required for effective Workflow Tracking. Operational procedures, regulations and other requirements specific to each Team were then customized into each solution. The Workflow Tracking solution for each Team included tracking for both high level Work Order data and task level data, shared human resources, and outsourced work from external departments. These items are now managed effectively by each Team. Each Team can easily view Work Breakdown Structure—all tasks and how they are dependent upon one another.

The Workflow Tracking Tool prevents each Team from having to track data locally and re-enter data to report to headquarters. The future intent is that each Teams' data will automatically be synchronized on a real-time basis with a HUB that will be available for Executive Reporting and insights utilizing Power BI.
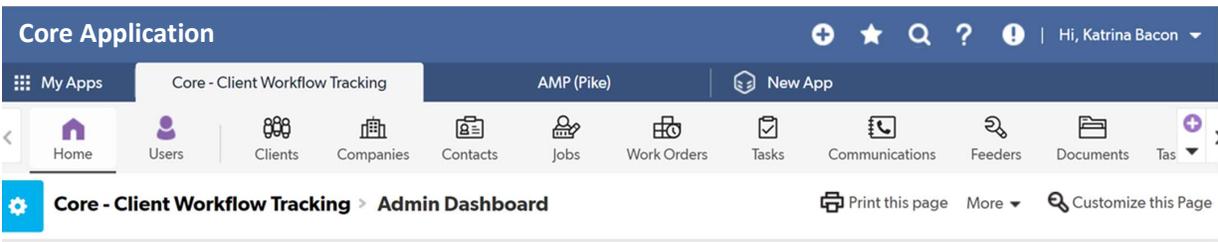
Welcome to the Core Application

A DEEPER LOOK:

The HUB will track high level metrics summarized from each individual CORE application providing a high-level view of the health of each Client as a whole with the ability to drill down into specific Jobs and Work Orders for more detail. The specific details from Tasks, etc. are feeding the Job and Work Order metrics for the HUB but are not readily accessible in the HUB itself. That level of detail will be reserved for the individual CORE applications. Financial data which is housed outside of the individual CORE Quick Base applications will also be fed into Power BI along with the HUB data so that Senior level management can tie Financial health to Project specific data. Workflow Tracking Tool training for all users has been provided via a Train –The-Trainer approach and a suite of documentation (Technical and User) has and will be provided for all deployed versions of the CORE Application. Any customizations relevant to a specific teams' version of the Tool have also been documented.

Deployment and Post-Deployment support has been provided via a REALM Management application (AMP) that allows all users to submit and track Defects, Issues and Enhancements. The MCFTech and Company X Quick Base deployment team review and allocate any support cases that are submitted and require development support.

THE BENEFITS:

The MCFTech Workflow Tracking solution has increased collaboration among individual Client teams as well as teams across Client and Geographical borders. The Company X Quick Base deployment team have encouraged sharing best practices, interaction, and discussion which has resulted in a Companywide community of Quick Base users. The business improvements have been clear, as individual teams are no longer functioning as separate entities, but sharing processes, challenges and solutions, creating a dynamic community within the Company as well as providing standardization where possible.

This successful solution has led to:
- Accurate workflow management
- Real-time visibility for executives into status, metrics, and performance
- Improved collaboration and shared best practices between Teams

CORE Workflow Tracking Tool FEATURES
- Custom Work Type Templates
- Custom Job/Work Order/Task forms
- Custom Pole/Unit Tracking
- Custom Invoice Tracking
- Custom Parcel Tracking
- Custom Permit Tracking
- Custom additional information
- Custom email notifications
- Custom Client level Workflows
- Custom Assignment processes
- Custom roles & security permissions
- Custom integrations to outside services such as Fulcrum and Replicon