



PSC Case Study

Qualified Wins: Process and Platforms Transform Bidding and Reduce Risk for Construction Services Firm

The Strategic Project Qualification (“SPQ”) and risk management process for a billion-dollar national construction company needed an overhaul and migration from their legacy forms, workflow and collaboration platform. PSC Group optimized the business process and risk assessment by building a new, more efficient solution on the Microsoft Office 365 and Nintex Workflow platforms.

The Situation

In any sized construction business, great resources, effort, and expense go into identifying new project opportunities and their risk factors. This leading construction services company’s Risk Management team (including their CEO) carefully evaluates every opportunity to determine whether to bid the project or forego it based on several important factors. This business-critical process helps the firm bid on projects it has the best chance to win and that present the least amount of risk, minimizing time and money spent on lower-percentage, high-risk, and high-value bids and work.

The firm’s legacy solution for collecting data and qualifying projects was built on outdated, soon-to-be-unsupported technology and constituted a number of manual steps, making it inefficient and costly to support and utilize. Having recently worked with PSC to roll out Office 365 and SharePoint online, the firm chose to build the new solution on the same platform and engaged PSC to design and implement it.

The Challenges

The existing SPQ process involved two distinct steps. The first step, the Initial Project Qualification, contained high-level project information and questions around a potential contractor’s previous work, market position, capacity, fit, and competition to deliver. That was followed by the Detailed Project Risk Analysis that included some of the initial qualification information, as well as deeper project insights such as safety, budget, staffing, contracts,

bonding/insurance, profitability, and other management considerations.

Each were form driven and completed by multiple stakeholders before subsequent review or discussion could be scheduled. A great deal of effort was required for the preparation of both forms, and much of it was subject to personal insights and experience that had to be gathered based on stakeholder availability.

The existing solution also lacked reporting capabilities, making it difficult for the team to find past project documents and information relevant to the project being considered for bid. The new solution needed to capture data at a more granular level and store it, so it could be easily searched, compiled, and aligned with new bids to save both valuable search time and future pre-qualification effort. The two-step process was inefficient, and the team wanted to both simplify the process and make it more of a collaborative effort to prepare for each Bid/Risk Review meeting.

The Solution

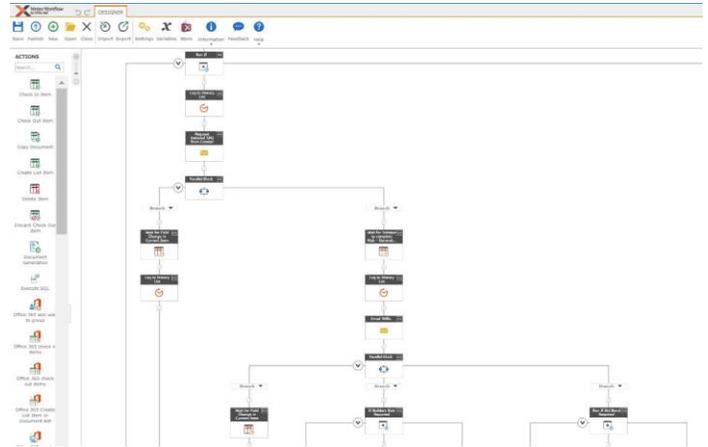
PSC worked with the Risk Management team to map out a new, more efficient SPQ process and implement a solution on Office 365 online. PSC advised the firm to build the solution’s forms, workflow, and document generation on the Nintex advanced workflow and intelligent process automation platform.

The PSC team engineered a solution with several improved components. First, a detailed SPQ form built on the dynamic Nintex platform was created and allowed risk management staff to attach documents and other valuable project artifacts to help qualify the risk of each bid. Next, an automated data collection workflow based on a user-managed business rules engine was created that notifies select team members when there are new opportunities to review. This step would help ensure the right stakeholders are properly engaged with the right projects, at the right time during the process.

To streamline the all-hands Bid/Risk Review meetings and process, the solution automated the generation of a project specific .PDF document that summarizes bid risk factors. Document templates can be managed by business users and bid risk data is auto-populated at runtime when the document is generated ensuring the latest inputs are readily available for the team's assessment.

Finally, dynamic Power BI dashboards added powerful business intelligence capabilities to provide status and insights into the bid process and risk data stored in SharePoint Online. This step ensures key data points, assumptions, and lessons learned are captured and leveraged for future project qualifications.

The new solution streamlines the SPQ process by reducing data entry and data duplication, allowing the Risk Management team to spend more time collaborating throughout the process rather than assembling content required for it. The solution helps better prepare the risk management team for Bid/Risk Review meetings, arming them with critical documentation that is generated automatically without requiring staff to assemble the documentation manually from the data collected during the bid review process. The end-to-end solution has transformed the firm's project qualification and risk assessment process and will enable ongoing improvement as well as valuable insights and data to serve the firm's future.



Pains

- Legacy technology no longer supported by IT.
- Duplicate data entry and inefficient workflow didn't match the current business process.
- Manual processes were required to prepare documents for the Bid/Risk Review with the CEO.
- Lack of reporting on previous, similar opportunities which could be used to improve responses to future opportunities.

Gains

- New solution built on existing Office 365 intranet platform provided consistent navigation, single sign-on, and security.
- Workflow improved with single data entry point and reusable info throughout the entire process.
- Automatic generation of documents required for Bid/Risk Review meetings.
- Improved reporting capabilities on previous opportunities for preparing future qualifications.



It's all in the way we listen.®

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