

Architects Improve Planning Using Planifi Project Analyzer

Robert A.M. Stern Architects (RAMSA) found themselves asking the same fundamental questions about their business: What is our backlog? What is our capacity to deliver on new projects? How do our people and projects align for the next week, two weeks, and so forth into the future?

Unfortunately, like so many other firms in our industry, they didn't have data-driven answers they could trust. That is until they started using Project Analyzer and Project Visualizer from Planifi.

We sat down with David Freedman, CFO at RAMSA, to learn more about how the firm previously handled resource planning and forecasting, and what benefits they have seen since starting with Planifi.

Like so many other firms in the industry, they were relying on Excel spreadsheets. But, as David pointed out, "That obviously has so many flaws and risks. Not only with regard to incorrect calculations, but it's also extremely difficult to consider alternatives. You can't move things around or make changes very easily."

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Schwarzman College at Tsinghua University, Beijing China – Photographer Credit: Peter Aaron / Otto for Robert A.M. Stern Architects

Advancing from Excel to Planifi

RAMSA realized Excel wasn't powerful enough or agile enough for leadership to confidently make key strategic decisions. They needed the ability to, not only analyze current and past data, but also clearly see future opportunities to direct the business. David explains, "I think what RAMSA recognized was the need to put something more robust in place. Something that enables us to look as far into the future as we possibly can and get a feeling for, not only what have we got and where it's going, but if there's any trend changes."

Tracking Project Performance

The first step was creating a baseline for project evaluation. Fortunately for RAMSA, Planifi Project Analyzer gives everyone in the firm a reliable view for projects and phases. As David put it, "At the beginning, you're very focused solely on the micro level of individual projects, then understanding where you are going to come through to the end of the project. This was quite an eye-opener for everyone - from the junior project manager to the top - to see how different a project could look a quarter-of-the-way through versus complete."

Repeatable Best Practices

Building on that project-level data, RAMSA has learned from each project and established a repeatable set of best practices. David continues, "On that level, the way things have progressed, we now have a good history, a set of precedents. We can look at a project and easily say, "I remember a similar project we did three years ago and this is how it turned out. Why should I expect this project to turn out any different?" It's great to now have reliable data to make that comparison." With Planifi, the firm can accurately plan up front and eliminate surprises.

Beautiful Visualization of the Data

We have learned over the years that, like many, Architects are visual people. Graphs are much easier to comprehend than raw data. If we wanted to get Architects to use and enjoy our software, we needed a beautiful representation of data to attract users. David confirms, "One of the big things that Planifi offers us is the visuals, which for architects is a beautiful thing. They're not necessarily all that keen on looking at the numbers, but they can see a pie chart. Immediately recognizing: it's got a red piece in it because it's under-performing expectations. That gave them a whole new perspective on project performance."

Visibility for Project Managers

Building tools project managers want to use is core to our products. David described how project managers could have more effective discussions around project resources and performance, "With a quick look at Planifi Project Analyzer, they can see which resources are booked." As David pointed out, "That visibility means there's no hiding place and a project manager can know, if I need someone, who's available and not."

Visibility for Leadership

Like many firms, RAMSA found backlog and cash-flow forecasting very challenging in the face of unexpected changes and delays. Planifi Project Analyzer and Project Visualizer now provide the leadership team with ever-current information on performance, staffing, and backlog. David again, "Just having that visibility positions you to better understand what's going on. Is there really a drop-off in the workload that comes down the line? You only have so much guaranteed work at a given time and surprises can cause big disruptions for the firm."

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Proactive Planning Improves Efficiency

The additional visibility was great for the firm, but they also realized increased efficiency. Reliable metrics enabled leadership to identify gaps and become proactive planners. According to David, "That's how we have really tightened up on the efficiency. If you're surprised by a drop-off, you need to react as it's happening and, at that point, it's too late in the game. You either lose money on unassigned resources or the client suffers as you play catch-up with what's available. It's much better with the visibility we get from Planifi."

Benefits Across the Business

With everyone now looking at the same data, Planifi has become a core component in leadership and staffing meetings. David explains, "It has become the standard for leadership to make decisions on staffing, project pricing, and competition. We've always had the ability to plan out what a particular effort might cost, but now we can also understand what that project means for the business."

The Bottom Line

After making the decision to leave spreadsheets behind and standardize on Planifi Project Analyzer and Project Visualizer, RAMSA has realized benefits across the firm. With historical project data and accurate forecasting, leadership is empowered to make key strategic decisions with confidence. Proactively identify trends & make adjustments, maximize profits with improved visibility, and design your firm for the future.

