



PLANIFI

Case Study



CLARK NEXSEN

Planifi Project Analyzer Delivers Actionable Intelligence For Clark Nexsen

Clark Nexsen, a fully integrated architecture and engineering firm with nearly 500 employees, 10 offices, and a global reputation for excellence in markets ranging from infrastructure to K-12 were facing the same challenge that a lot of A/E firms have; getting actionable intelligence from their management meetings.

We sat down with Clark Nexsen's Chief Operations Officer, Bill Keen PE, LEED AP, to learn more about how Planifi Project Analyzer and Project Visualizer helped their firm manage their continued growth.

"We've always had these management meetings where we talk about our workload and where we need to share people from office-to-office or group-to-group. We didn't really have any data to rely on, so it was one of those situations where whoever made the best argument usually got what they were looking for and those who didn't make a great argument were unhappy when they left the room," said Bill.

He added, "The difference is now we have information-based meetings. We're looking at data and it's telling us something, informing us, so we make better decisions. The whole agenda of the meeting is different, and the way things move forward is: we look at the workload, look at availability, and we can now make informed assessments based upon that."

"Before we acted on hunches and guesses. Now we're acting based on knowledge."



Visibility Into Where The Revenue Is

"Using Project Analyzer has also broken down a lot of the silos that we had based on location. First, since Analyzer is enterprise-wide, we know where the revenue is coming from - whether on an office-by-office or principal-by-principal basis," stated Bill.

Proactively Planning The Workload

"Now, we also know where the workload is coming from and where it needs to be. Since we're able to plan across the entire firm, we do a lot more work-sharing on projects between offices. It's rather common for us today to handle the architecture work on a project from three different offices. It's led out of one office, but you can bring in people from other offices to tackle certain elements of the project."

Competitive Edge On Recruitment

Having visibility into future projects and staffing by discipline gives Clark Nexsen a leg up on recruitment. "Most firms today are like us. You're recruiting young graduates on a regular basis, you're out at colleges and universities, recruiting summer interns or you want to hire them when they graduate. You need the ability to look forward because oftentimes we need to make offers in January or February, before they graduate, in order to onboard in May, June, or July."

Deliver Information Effectively

Using Project Analyzer is a more effective way to deliver information to project teams. According to Bill, "The discipline leads go in and see where they stand quickly and easily. That's one nice thing about Analyzer, you configure your grid views for the way you want to see them. If you're a mechanical engineer and you just want to see how your discipline is doing on this project; set your filter for mechanical and every time you open it up or open another project, it's already filtered for mechanical instead of having to go through and redo the filtering."

"You can also deliver the information about the project financials more efficiently. We have a good visual view from a graphical standpoint and the ability to look at budget versus actual performance very quickly. I have a reliable view of how the project is doing financially. This enables a more effective conversation with the team." added Bill.

Focus on Real Project Execution

"What Analyzer ends up doing is freeing up more time to deal with material issues on the project. We're able to clear blocked tasks because there's a coordination problem or spend some time making sure we understand the scope and client expectations, that's common amongst everybody," stated Bill.

"Everyone gets it, people are no longer off doing their own thing. We have more time to devote to real project execution issues in project team meetings versus spending so much time going over the budget, how we're doing against the budget, or project schedule. that sort of thing. It's easy to throw [Planifi] on a projection screen and review together."

"We have more time to devote to real project execution issues in project team meetings"

"Everybody has access to it whenever they want, so they're aware of the status. We use Planifi Project Analyzer to have contextual conversations with the team to identify a problem and address it, so we improve and have a more positive outcome on the project."

"Now we have a really valuable discussion about where we are with respect to budget and earned value. We didn't have that before, it wasn't easy to do that in the past"

"That's what we're seeing today. In the past, the project manager would usually come to the meeting with 20 copies of the budget report and would pass them around the table and people would be reading their stuff and not paying attention to the conversation."

A Company That Listens

While it may seem like a little thing, everyone at Planifi is committed to truly listening to our customers and building software that will make customers more successful. It seems to be working, as Bill noticed.

"We genuinely get the sense that you guys are interested in developing the product around us, or at least around us in the A/E community. You're not writing software and expecting us to adapt to the software. You're adapting the software to the way we're working so we get the value out of it."

"We can definitely tell that you're listening and heading in that direction that we want to see it go."

Getting Better All The Time

I think Bill says it best in his summary remarks to us, "There isn't a silver bullet application out there but this is pretty close. It's getting better all the time and I think we're growing our processes along with the software, so definitely become part of the way we work and the way we lead our projects. That's for sure."

