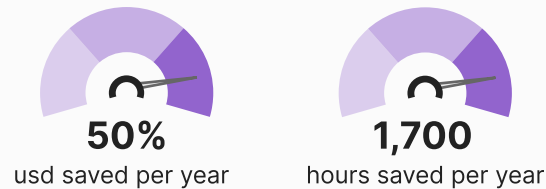


Saving \$300K and 1,700 Hours per Year Using Birdview PSA

RESULTS ACHIEVED:



CHALLENGES

Lack of a single source of truth

- Hatch LTK was using an Excel-based workbook and Deltek Costpoint ERP system to manage its processes. To improve data delivery to support effective business decisions and reduce business risks, the team needed to integrate all of its business systems into one enterprise system.

Need to improve resource utilization

- The team wanted to improve visibility into its resource utilization and availability to project future resource demand and make timely hiring decisions.

Inefficient project management delivery processes and procedures

- Prior to the implementation of Birdview PSA, there was a team of project accountants who manually compiled static data and Excel-based reports from multiple systems, which was very labor-intensive. As a result, the team had version control issues in addition to the manual burden of maintaining that data each month, which often lagged by a couple of weeks. It was also difficult to create portfolio level reports summarizing data across the enterprise.

Time-consuming manual and repetitive tasks

- Before Birdview PSA, the Hatch LTK business development group was creating proposal plans manually and using emails to coordinate and follow up on workflows. It took team members hours of valuable time that, instead, could be spent on more important tasks.

HATCH LTK

INDUSTRY

Engineering

DEPARTMENT

Transit Business Unit

TEAM FUNCTION

Professional Services

EMPLOYEE SIZE

1300

COMPANY

DESCRIPTION:

Hatch LTK is a professional services firm delivering technical and strategic services to the infrastructure sector, with a focus on Passenger Rail. The organization provides highly specialized technical and management expertise to meet its clients' toughest vehicle and systems engineering challenges across the globe.

WHAT WAS REPLACED

Excel



“By leveraging Birdview PSA, we were able to standardize our processes through every stage of the project life cycle while tailoring the system to fit our needs. By having all of our business systems and information integrated into one enterprise system source of truth, we can leverage powerful business analytics through custom Power BI reports.”

Erika Brown

Director of Project Assurance and Controls

SOLUTION



Customization

Besides custom reports, Hatch LTK benefited from a great level of customization across various functionalities offered by Birdview. For instance, custom forms and custom fields helped standardize the overall project intake process across the organization and are now constantly used for creating new projects in a few clicks. The team also went from emailing fee packages and Excel-based intake forms to leveraging the custom forms and message board.



A Single Source of Truth

By integrating all business systems into one enterprise system “source of truth”, Hatch LTK increased its team efficiency and effectiveness of processes, and improved communication between Project Manager, Resource Manager and each staff member. Shortly before implementing Birdview, the company also switched from Deltek Costpoint to SAP and currently uses the last one in close collaboration with Birdview PSA.



Resource Management

To get a quick view of the overall team capacity, assigned hours, projections, and resource loading, Hatch LTK uses the resource capacity and availability report that was custom designed by the Birdview BI team. The resource loading report provides a heat map view of resource loading by month, with the ability to filter by discipline and locations to ensure Hatch LTK has the right person with the right skills at the right time. This helped improve resource management and project management collaboration, as well as make smarter and more timely hiring decisions.



Custom Reports

Hatch LTK can now run project reports in real time to have a quick insight into the overall status and deadlines of their projects. They can also quickly identify potential budget overruns and identify expiring contracts to begin negotiation with the clients well in advance. This helps reduce business risks and bring higher value to their clients.



Financial Management

Hatch LTK needed a custom functionality allowing them to set different rates for an individual user within a single project. That is why the Birdview team developed custom rate functionality based on its rate cards purpose-built specifically for Hatch LTK needs. Rate cards also help the team in forecasting revenue across multiple years and calculating project costs to provide early indication of potential over/under runs and ensure mitigation.

RESULTS

It took Hatch LTK almost a year to search for a perfect solution to meet all of their organization's needs. Initially, the team started with a list of over 30 potential solutions that was later narrowed down to the top 10 tools. The main reason Hatch LTK chose Birdview PSA (formerly Easy Projects) was the software's **ability to integrate with all business systems to achieve a single source of truth**. It was also simple and easy to use for the end user. The Birdview team also provided excellent post-training support, thus making it easier for the entire team to adopt the tool.

With Birdview PSA, Hatch LTK achieved the main objectives originally set out. The team **improved its resource management and utilization, project management, and business intelligence reporting**. Thanks to the improved resource management, the team gained early **insight into resources in real time to support hiring decisions**, increase utilization by leveraging underutilized resources and relieve overloaded resources and respond quickly to short-term work.

Birdview PSA helps to **standardize the entire project lifecycle in one central location**, starting with our opportunity intake process. Instead of creating proposal plans manually, the team used templates and start/end dates feature for automated notifications, as well as the built-in chat feature. It helped **to create efficiency across BD and PM teams, facilitate getting proposals out the door** and meet tight deadlines. As a result, it allowed the team to **save approximately 500 hrs and \$100K per year**.

Centralizing all of the data in one single source of truth allowed Hatch LTK to **align a variety of metrics at the project, resource and portfolio level to fit business needs** and leverage the power of business analytics. This also **streamlined the team's ability to collaborate** on the evaluation and decision to pursue new work. Besides, Birdview helped to reduce manual ad hoc data and manual creation of monthly reporting resulting in approximately 1,200 hrs and \$200K saved per year.

Ultimately, Birdview PSA helped Hatch LTK to **improve project management delivery processes and procedures throughout the entire life cycle**. The team was able to build cost estimates directly in the system as well, which provided early insight into resource loading within the Easy Projects native resource module.

