

PRAGMATIQ

COMPANY CASE STUDY

RIGOUR SURVEY



COMPANY BACKGROUND

Rigour Survey provides precision surveys to architectural, engineering and construction clients. To do, the team uses equipment from 3D photography, laser scanning, drones, ground-penetrating radar, total stations and GNSS. These surveys are used to minimise risks of inaccurate planning and maximise long-term cost efficiencies.

Previously using multiple spreadsheets, SharePoint lists and Outlook to manage business operations, Rigour Survey engaged with Pragmatiq to design, develop and implement a bespoke solution built on the Dynamics 365 platform.



CHALLENGES

- › Previously used multiple spreadsheets, SharePoint lists and Outlook to manage business operations
- › Searching for information in the previous set-up was time-consuming and laborious
- › Difficult to gain end-to-end visibility of projects
- › Limited insight into resource and equipment needed for a project
- › Lack of systemised process for engineer time entries
- › Heavily reliant on employee knowledge and expertise
- › Management lacked insight to make key strategic decisions



SOLUTION

- › Designed and implemented a Custom Business Solution, built on Microsoft Dynamics 365
- › Functionality to accommodate sales activities, proposals, quotes, scheduling, and project delivery
- › Users can define what resources are required for a potential project and manage this end-to-end
- › Users can convert an opportunity to a project, within one click
- › Implemented a Schedule Board leveraging functionality from Microsoft Dynamics 365 Field Service
- › Ability to leverage the reporting capabilities in Dynamics 365
- › Established integrations with Outlook and SharePoint, enabling Rigour Survey to store project documentation, sales collateral and other communications



BENEFITS

- › Improved visibility and access to information
- › Improved project management
- › A stable platform for future growth
- › Enhanced reporting and insights

CHALLENGES



Rigour Survey previously used multiple spreadsheets, SharePoint lists and Outlook to manage business operations. Due to this, information was difficult to access, and users spent significant amounts of time searching for data that is needed day-to-day. It was also a challenge to get a connected end-to-end view of a project, for example, they had no way of connecting time entries to a scheduled project task, so management could track estimations versus actuals.

The disparate set-up also complicated activities around resource management. Staff used Outlook calendars to plan and schedule resources, however these would become fragmented when projects spanned multiple days. It also did not show users what resource and equipment they needed, or what was currently in use.

From a business continuity perspective, the lack of a centralised solution presented challenges, as Rigour Survey was heavily reliant on employee knowledge and expertise. As the business continues to grow, this approach would become unmanageable and restrictive.

SharePoint lists were used across the business for capturing various information. The data within here was not properly connected to other systems and made it difficult for users to find relevant information, as well as often needing to duplicate data input.

Due to data residing in different applications and a disconnected way of working, management also lacked insight into key areas that could help drive strategic decisions.

To support the business moving forward, Rigour Survey needed a solution that can manage their end-to-end processes, from proposals and quotation, through to scheduling and delivery.



SOLUTION



To overcome the challenges Rigour Survey faced, Pragmatiq designed and implemented a Custom Business Solution, built on Microsoft Dynamics 365. This included functionality to accommodate sales activities, proposals, quotes, scheduling, project delivery and other key areas. All users now have visibility of the information required for their day-to-day activities, and crucially, can access this quickly and easily.

Within the system, Rigour Survey can now define what resources are required for a potential project (licenses, equipment, engineer, etc.) and then convert this within one click, from an opportunity to a project. There is no need for users to re-input this data, as it will automatically carry over onto the project record. Users can then use this information to schedule the work, using the resource scheduling board Pragmatiq implemented; the Schedule Board leverages functionality from Microsoft Dynamics 365 Field Service.

To support time entries, functionality was developed in the system to allow engineers to track time spent on projects. This automatically links to the scheduling board, ensuring that information is automatically stored against the relevant project. In addition to this, engineers can use the Dynamics 365 mobile application to easily submit information whilst on-site.

By capturing all information within a centralised system, Rigour Survey now has improved visibility around costs. This insight is particularly useful for understanding project cost estimates versus actual time spent, as well as understanding how much profit the business will make.

To support reporting, Rigour Survey can leverage the reporting capabilities in Dynamics, providing quick insights into overall progress across multiple projects. Staff can also use the comprehensive search capabilities within the platform to query and analyse projects in greater detail. In future, Rigour Survey has the potential to adopt Power BI, if they require greater reporting capabilities.

Lastly, integrations were established with Outlook and SharePoint, enabling Rigour Survey to store project documentation, sales collateral and other communications against the relevant record in Dynamics. This saves users time, as there is no longer a need to search through different solutions to find information.



BENEFITS



Through the implementation of our solution, the following benefits were realised:

- **Improved visibility and access to information** – As a result of centralising information in one place, users reduce time searching for information and can conduct their daily tasks more efficiently. Additionally, the solution can be accessed from a mobile application, supporting engineers on-the-go.
- **Improved project management** – Rigour Survey can now use the scheduling board to define project resources and schedule upcoming work. Alongside this, engineers can easily track their time entries against a project, something that was not possible before. As a result, the project management process across the business is more organised and structured.
- **A stable platform for future growth** – Business processes are now logically systemised in the new solution and data is accessible to those who need it, rather than relying on individual knowledge. As Rigour Survey grows and the business requirements change, Dynamics 365 can be customised to fit around new processes and provides a stable platform for growth.
- **Enhanced reporting and insights** – Management can now gather key insights quickly and easily using Dynamics 365 reporting capabilities, allowing them to make more informed decisions. In future, there is potential to leverage Microsoft Power BI if Rigour Survey requires more advanced reporting functionality.



“We commissioned Pragmatiq when it became clear that ‘off-the-shelf’ CRM systems wouldn’t be suitable, and what we required was a Bespoke CRM for our surveying business. Our existing processes had become highly inefficient and fragmented, unable to provide the structure, insights and reporting capabilities needed for growth.

Microsoft products were already used throughout our business and Dynamics 365 integrated perfectly with this. The team at Pragmatiq were very thorough and took the time to really understand our needs, through various meetings at all stages of development, and have been able to create a Bespoke CRM Solution that will grow with our business. Supporting our daily operations, centralising data and providing the automation, structure and visibility around project management and operations that was previously lacking.

Their approach to the project, and the development stages put in place, provided a clear path for all parties to collaborate efficiently and effectively to achieve our end goal.

We would highly recommend Pragmatiq, with their extensive knowledge, professional approach and continued guidance and support received throughout the initial project, as well as with further system integrations and development.”

ABI SMITH - GROUP PROCESS SUPPORT MANAGER AT RIGOUR SURVEY



CAN WE HELP YOUR ORGANISATION?

Pragmatiq are a Microsoft Partner, specialising in building bespoke technology solutions that solve real problems and make a difference.

If you want to learn more, please get in touch...

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