An Emergency Response company increases productivity and enhances reporting using SharePoint Online and Power BI.

Optimum helps client to digitize their proposal and contract tracking process using SharePoint Online and utilize Power BI to provide real-time and relevant KPIs and analytics.

Industry

Emergency Response

Country

United States

Challenges

The client used manual processes and disparate spreadsheets to track and manage their proposals and contracts. The internal teams created KPI reports manually and using Excel, requiring extensive time and data manipulation. These reports had to be customized for different users on a monthly, weekly, and daily basis and the requirements changed regularly. Also, managing the version of the data and spreadsheets was a major challenge and weekly reports provided to executives were not real-time and accurate.

Optimum's Involvement

Optimum developed an integrated and automated solution using SharePoint Online, PowerApps and Flow, and Power BI, which allowed for tracking and managing all the activities and tasks for proposals and contracts as well as real-time KPI reporting to various levels of management teams. Workflows were developed to automate the review and approval process, all tasks and activities were accessible and managed in one centralized location by team members, and dynamic Power BI dashboards made reporting easier and more accurate.
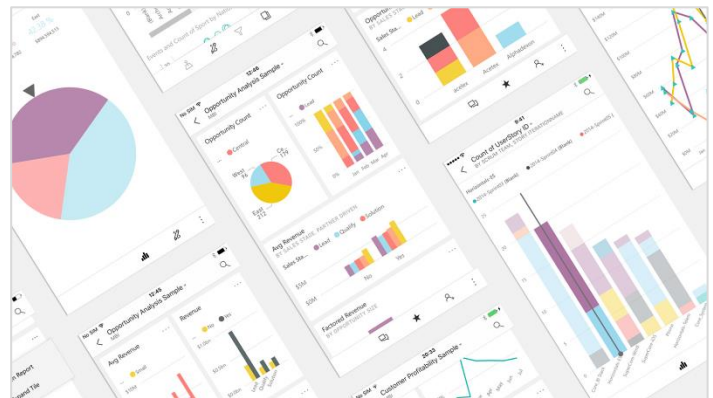
Results

The optimization and automation of the proposal and contract processes allowed for a single point of data entry, better management of tasks and documents, streamlined communication, and increased productivity and efficiency. Integrating Power BI then created an accessible solution that provided powerful analytics and KPIs, while empowering the employees to create and view the reports that were relevant to them in real-time and using interactive graphs and aggregated data.

The Client, a crisis and emergency response firm, engaged Optimum to optimize and automate their proposal and contract management processes and enhance KPI reporting for the executive team. The contract and proposal management process utilized a combination of spreadsheets and an existing CRM system to enter, compile, manage, and aggregate information for metrics and KPI reporting. The data gathering, aggregation, and reporting process as well as managing tasks and activities was very manual and time-consuming, resulting in reduced team efficiency and reporting accuracy.

Working with the client to understand the current and desired state, Optimum's team of Office 365 and SharePoint experts designed and developed online trackers, forms, and approval workflows to gather, manage, and report on proposal and contract information. The trackers were accessible to other departments to submit documents and contracts to be reviewed by the Contracts team and workflows were developed to automate the review and approval activities. Optimum also created internal automated workflows for the Contracts team, including task assignment notifications and reminders for approaching deadlines.

Optimum then worked with the Contracts team to gain an understanding of the reports that were currently generated and the relevant KPIs. Once all KPIs were defined and finalized, Optimum developed a Power BI dashboard, containing the high level and detailed KPIs and aggregated reports. The dashboard could be sorted and filtered by date or other business metrics. Also, users can interact with the charts and graphs and drill down or roll up the data and information to meet their various reporting needs.

The data on the dashboard is refreshed automatically, providing an accurate and real-time reporting capability to the Contracts team and their executives, resulting in increased visibility and improved efficiency.

About Optimum

Optimum is a modern Software Solutions and Services firm, transforming businesses through the power of People, Innovative Technologies, and Automated Processes.

By utilizing our expertise and experience in strategic planning, process optimization, and innovative technologies, our clients gain clarity and productivity, reduce operational and labor costs, ensure compliance, and enable business automation and transformation.

Optimum offers a full suite of software services and solutions, including Software Development and System Integration, Office 365 and SharePoint Development and Consulting, Business Process Automation and Optimization, Business Intelligence (BI) and Data Warehousing, Work Automation and Project Management Software Solutions, Blockchain and IoT Solutions, and IT Staff Augmentation. Learn more by visiting www.optimumcs.com or contact info@optimumcs.com|713.505.0300 to speak with one of our Office 365 and SharePoint experts.