

CHANGE AGENT PLAYBOOK FOR A/E FIRMS

Drive growth with real-time,
fully interactive dashboards
in a modern ERP.



Unanet™

A/E

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INTRODUCTION

A/E firms have a great opportunity to lead the world into the future, but the industry's greatest asset—the massive volumes of data collected from decades of intelligent design experience—is sitting wasted in clunky, archaic ERP platforms. Unlocking the data that will shape the future of the world is critical to being successful in this new reality, but it hinges on your ability to view, explore, and preserve this information in powerful analytic dashboards.

This ebook will explore:

- Today's opportunity to remake the future
- Why legacy solutions are ill equipped to lead the data revolution
- 10 characteristics you should look for in your analytic dashboards
- What powerful, data-based decision-making looks like

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The World is Changing. A/E Firms are the Change Agents.

Digital transformation. Smart cities. The Internet of Things. Augmented reality. The world is growing and shrinking at the same time, putting the entire world at anyone's fingertips.

A/E firms are at the forefront of this transformation—gaining an opportunity to use decades of intelligent design experience to shape the modern world.

But being a change agent isn't easy.

A/E firms are undergoing massive digital transformation of their own, radically changing how they do business. They need to streamline workflows, optimize resources, gain insight into project performance, and determine what opportunities to pursue and which ones to abandon—all in an effort to compete in an industry facing fierce competition and shrinking margins.

DATA IS WHAT MAKES DIGITAL TRANSFORMATION POSSIBLE.

More specifically, it's the ability to capture, access, and analyze data that creates true differentiation. Stakeholders throughout the organization need reliable, quick access to actionable information to make quick, informed decisions in real time. Only then can A/E firms enable the agility and growth that is necessary to take advantage of opportunities resulting from rapid changes in customer expectations and market conditions.



Legacy ERP Platforms Cannot Meet Today's Data Requirements.

ERP platforms built 20 years ago that run on antiquated architectures cannot meet the data analytics needs of today's A/E firm. Complexity combined with a lack of flexibility and scalability are preventing A/E firms from gaining visibility into their data—visibility that would allow them to create meaningful insights that empower decision makers.

Static Data

Legacy ERP platforms do not give firms the ability to interact with data in any meaningful way. They may be able to generate a report that shows that July billings are down, but they don't know why and can't recommend a course of action to reverse the trend.

Out of Date Data

The time it takes to pull data together, format it, and generate a report is time-prohibitive. At the end of the largely manual process, the information is old, out of date, and isn't relevant to conditions on the ground.

DATA IS A WASTED RESOURCE.

The result is that A/E firms are unable to take advantage of the mountains of raw data associated with performance and project value. It just sits there, in some database or ERP platform, wasting away with firms unable to do anything with it.

This lack of insight forces A/E firms to drive the business blindly. They may be able to deduce that the company brought in more revenue than expense, but they can't drill down to the project, project manager, department, line of business, or principal level. This puts A/E firms at a distinct disadvantage. Yet, the data that could drive business agility is right there but unused.

YOU'RE NOT ALONE.

A/E firms around the world are struggling with getting the most value out of their ERP platform, and it's coming at a great cost to them and the industry as a whole. The world is looking to us to help design and create the modern world. But most firms do not have the data intelligence to deliver on this opportunity.

Fortunately, we're here to help.

A/E Firms Need a Modern Database Architecture for the Modern World.

We live in a world where data is king. It has the power to provide valuable insights that allow a firm to make informed decisions in real time, all the time.

No guesswork. No gut checks. Powerful analytic dashboards empower decision makers to pull timely, relevant data and interact with it in real time to create actionable information that informs every decision. Here are 10 things to consider when evaluating analytic dashboards in your ERP platform:

1 Real Time

Pulling and compiling spreadsheets is so 1990s. Why are you still doing it? You need to see data in real time with the ability to go back and view at any point in time. Otherwise, your data is outdated, irrelevant and pretty much useless for any valuable insight.

2 Transactional/Federated

A/E business models are complex with thousands of moving parts from resourcing and project timelines to margins and subcontractor rates. You need access to complex datasets to truly understand what's going on, so it's important that your ERP supports complex data queries and multiple data sources. It then needs to spit out this complex information in simple, easy-to-read dashboards that put real data behind analysis. It's also important to be able to present the data for different audiences. We all know that some people like visuals while others prefer tables and transactional-level details. Your analytic dashboards should support both.



3 Fully Interactive

Explore your data through intuitive dashboards to discover new insights. Make sure you can interact with the data in interesting, valuable ways such as a slide to filter across a date range, bar charts that double as filters, and the ability to drill down into timesheet and other transactional data. This allows decision makers to analyze data in a way that is helpful for running the business. For example, a firm can go behind just the high-level organizational level and see how revenue stacks up against expenses on a project, project manager, department, line of business, or principal level. Or they can track the types of opportunities they typically win or tend to lose. Exploring the data allows you to start to recognize trends and inform the type or scope of projects the firm pursues. This is the kind of valuable insight that drives operational efficiency and growth.

4 Standardized

Everyone needs to play from the same sheet of music. Centralized and standardized analytics brings teams together, removing technology barriers and increasing team performance. This allows you to align KPIs with business goals and use data to measure and optimize your efforts—including the ability to determine what metrics really matter to the company and what defines success. A data visualization dashboard allows firms to track progress toward KPIs and goals while adding incentives to really optimize performance.

5 Data Orchestration

A modern ERP solution allows firms to orchestrate the flow of information across the organization and unlock insights that promote collaboration and empower people to get more done. You can use this information to automate complex workflows across the business, so your teams can focus more on the important stuff that drives the business forward.

6 Data Integrations

Your analytic dashboards need to sync with popular third-party solutions and publicly accessible API stacks. As data is created by different stakeholders across the organization, the dashboard should automatically pull information from data sets in real time. This hinges on the ability to integrate with third-party data and data from other systems such as marketing automation, employee on-boarding, HRIS or proposal generation. Having the right data—no matter where it comes from or who created it—provides more accurate insights into, for instance, the true costs of a project from bid through execution. You can then feed those insights into project management workflows and other systems through APIs, so you can orchestrate tasks across the project lifecycle—HubSpot to Unanet to DocuSign, for example.

7 Future Proof

As we've said before, the world is changing, and A/E firms need to be prepared to take opportunities when they come up. It's important your data isn't stuck in an antiquated database architecture that can't adapt and evolve. Your ERP platform should be constantly updated with new features, new functionality and new ways to interact with your data. Partner with vendors that value a continuous feedback loop—asking customers what they need out of the solution. It's also important to demand flexible licensing so you are not locked in.

8 Responsive, US-Based Support

Your ERP vendor should be a dedicated partner in your success, not someone who will restrict the value you get out of the solution. Choose a vendor who offers several support options to meet your unique business needs. The best platform in the world can't provide value if it doesn't work for you.

9 Continuous Releases

It's critical that your software vendor consistently releases new features that meet your business needs and that you are always using the latest and greatest version of the software you are paying for. You shouldn't have to worry about updating or patching clients. Management of the solution should be automatic, done in the background by the vendor, so you don't have to waste resources to get your users up to the baseline.

10 A/E Focused

Get a solution built specifically for the A/E industry from a vendor that is a proven expert in the field. Don't try to adapt another industry solution or evergreen solution that doesn't fit your needs exactly. You're investing a lot into a solution, so it's important that you make sure it is right for your needs.



Data Visualization Leads to Optimized Workflows and Business Growth.

Getting analytic dashboards that adhere to these 10 principles allows you to get the most out of your data and derive powerful insights that inform every business decision.



OPERATIONAL EFFICIENCY

Put measurable KPIs in front of decision makers so they can catch bottlenecks and pivot when necessary without disrupting existing operations or adding complexity to employees' day-to-day responsibilities.



EMPOWER DECISION MAKERS

Give stakeholders the ability to create actionable information themselves without having to make a request to another business unit.



ENHANCE PRODUCTIVITY

Eliminate time-consuming manual processes for project managers who can then focus on driving project work forward.



ENABLE SUPPORT

Without fielding requests from project managers and other operations teams, support staff can focus on their core responsibilities of balancing the books, paying the bills and otherwise keeping the lights on.

Conclusion.

Digital transformation and shrinking margins are putting the squeeze on A/E firms around the world — preventing them from taking advantage of emerging opportunities to remake the modern world. Powerful analytic dashboards allow them to take full advantage of the mountains of valuable data they are collecting on performance and project value.

Stakeholders from across the organization need to be able to access real-time data, interact with it in interesting and innovative ways, and create actionable information that informs every business decision. Armed with these valuable insights, A/E firms will be able to create operational efficiencies, enhance productivity, and support agility and business growth.

No less than the future of the world depends on it.

To learn more, visit:
unanet.com/erp-ae