Project DocControl Enables B&I Contractors to Document Projects 40% Faster and Reduce Risk

B&I Contractors Inc.

- Full-service mechanical, air conditioning, plumbing, fire-protection and electrical contractor
- Specializes in commercial, institutional and industrial construction, both new and renovation
- Implemented Project DocControl in 1999

BACKGROUND

B&I Contractors Inc. is a full-service mechanical, air conditioning, plumbing, fire-protection and electrical contractor specializing in commercial, institutional and industrial construction, both new and renovation. Established in 1960 by Gordon Harbuck, B&I is still a growing company. It employs nearly 300 field personnel and works on projects up and down the west and east coasts of Florida, and is 95 percent employee-owned.

THE CHALLENGE

By the late 1990s, B&I had grown to the point where document management was becoming a big challenge. "We had no standardized document management process," said Jeff Zenoniani, senior project manager and long-time B&I employee. "Everyone was doing his or her own thing, which meant a combination of word-processing programs, spreadsheets, three-ring binders and file folders."

According to Zenoniani, when issues that affected B&I arose in a project, finding the documentation to defend the company's position would take hours. Many times, the documentation just wasn't there.

Zenoniani, who doubled as B&I's computer support technician, tried to solve the issue by connecting the company's only four computers into a peer-to-peer network. He and some of the other project managers also created a series of standardized templates and encouraged everyone on the project management team to use these forms.

But by 1999 it was obvious that this patchwork-quilt approach to document management had run its course. Everyone defaulted to the process they were most comfortable with, which invariably led to documentation that was inconsistent, difficult to find, and often lacked enough detail and organization to make it useful. Project management staff was wasting a lot of time creating and searching for documents. And incomplete documentation was putting the company at risk.

THE SOLUTION

It was around this time that Zenoniani was approached by Project DocControl. Within a few minutes of seeing the system in action, he realized that Project DocControl was precisely what B&I needed. "It was simple to use, it used our terminology and it looked at things from our side of the fence as a subcontractor," commented Zenoniani.

B&I purchased Project DocControl in September 1999 and got started with three or four user licenses. Since then, the company has entered more than 2,000 projects in the system and expanded usage to 20 licenses. B&I uses most of the system's core modules, including RFIs, submittals, transmittals, correspondence, change order requests and payment applications.

Project DocControl

THE RESULT

Greater Project Management Efficiency

Since using Project DocControl, B&I project managers and coordinators have increased their productivity significantly. Standardizing on one way of creating, managing and tracking project documentation means everyone can produce and find what they need faster, giving them more time to focus on other important tasks.

In fact, Zenoniani estimates that Project DocControl helps his team document projects 40 to 50 percent faster. That means B&I's project managers can now handle much more than they could before, which has kept the company from having to hire more support staff.

The standardization has also meant that B&I can be more agile and flexible when conditions change or personnel need to be reallocated. For instance, when a project manager is out on vacation, it's now much easier for someone else to cover his or her projects, because everyone is using the same system and process.

"We recently had to change project managers in one of our projects, and because we had a standardized way of documenting the work, the new project manager was able to pick up where the other had left off without a hitch," said Zenoniani. "There was no need to try and figure out the logging system or try to decipher someone else's handwriting. All RFIs, correspondence, schedules of value and change order requests were in one database, logged sequentially and updated with their current status."

Improved Visibility into Projects

Because all project documentation is centralized in one database, Zenoniani and the company's senior management have full visibility into all projects. Zenoniani can easily run reports that help him spot potential issues, both in his projects and in those of the project managers that report to him. Since all the company's foremen have access to the system and continually log important information,

Zenoniani can get a thorough and accurate picture of project health.

"For example, I can quickly see which change order requests are complete, which ones are pending because we're waiting to hear from the GC, which ones we're still assembling costs on—there's no guesswork," he said. "From a billing and cash flow standpoint, having an easy way to track this sort of information is incredibly valuable."

Reduced Risk

Project DocControl has also enabled B&I to reduce its risk exposure. A few years ago, during the closeout phase of a large project, B&I was being questioned on whether the building's ductwork had been tested. The GC couldn't find the information and was asking B&I for documented proof of the tests. Zenoniani went into that project's correspondence log, filtered the log using the word "test," and in less than two minutes was able to find and send the test results directly from the system to the GC.

"Before Project DocControl, this process could have taken hours," said Zenoniani. "And that's assuming we could even find the documentation."

Streamlined Change Order and Pay Application Process

One area where Project DocControl has had a tremendous impact has been on B&I's payment application process. Prior to using Project DocControl, B&I's accounting staff was entering all payment applications and schedules of value information directly into the company's accounting system. Although the company's accounting system is designed for the construction industry, this process was time-intensive and somewhat inflexible.

But since using Project DocControl, B&I has cut multiple steps and lots of time from the process. "Project DocControl is not an accounting system, and it doesn't pretend to be," said Zenoniani. "But it does a great job of taking what is a

normally a project management function—meaning filling out the pay apps and schedules of value—and providing an easier, more efficient and more forgiving way to get it done."

Once project managers fill out the information in Project DocControl, accounting simply has to enter the transaction summary in the accounting system. It takes just a few seconds to do, because all the detail has already been entered in Project DocControl.

"Getting our billing done faster and more accurately means we can get paid faster," said Zenoniani. "And if something changes, it's very easy to go back in Project DocControl into an older billing cycle and make that change. It's also the reason why we still have only one person managing all our billing. Without Project DocControl, we would need at least one more full-time employee to help get this done every month."

A Constantly Improving System

Operationally, Project DocControl has taken B&I to a new level of performance over the past 10 years. But for Zenoniani, Project DocControl's commitment to continually improving the system is just as important.

"These guys are always soliciting our feedback," he said. "They're always trying to make it better and basing their decisions on what we need to help make our jobs easier. That's important to us, because we're always trying to improve as a company. And part of that improvement means having better systems that enable us to do more, faster and better."

CONTACT INFORMATION

To learn more about how Project DocControl can help your business succeed, visit us at **www.ProjectDocControl.com or call 813.903.9446**.

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