

# How a Single Data Set For All of Your Teams Can Transform Your Business

Monday, September 16, 2019  
12:00 PM – 12:50 PM

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## Scott Rosenbloom & Mark Schwartz *Viewpoint, A Trimble Company*

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- Have your badge scanned at the door
- Attend 90% of this presentation
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# Transform Your Business

## Bad ideas

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# Transform Your Business

- Hire new management!
- Hire better staff!
- Miracle tech!

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## Transform your Business

Better idea  
Work the Fundamentals

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## Transform your Business

- Collect **Data**
- Create **Data Based** Items
- Report **Data** the Fundamentals
- Make **Data Based** Decisions

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Transform your Business

Data is the backbone of  
your business

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Digital  
Transformation

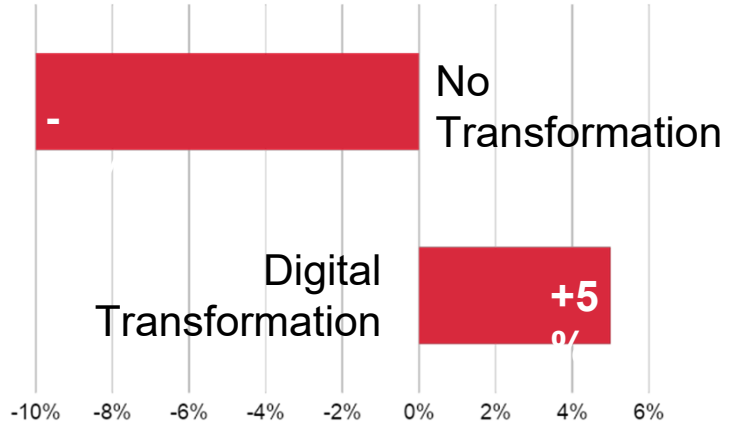
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## Digital Transformation: Why It Matters



Construction Firm:  
Relative Profitability



# Data Transformation

# The Power of the Data

Analyze the Data

Identify issues

Optimize workflows

Benchmark

Compare to other projects

By Geography

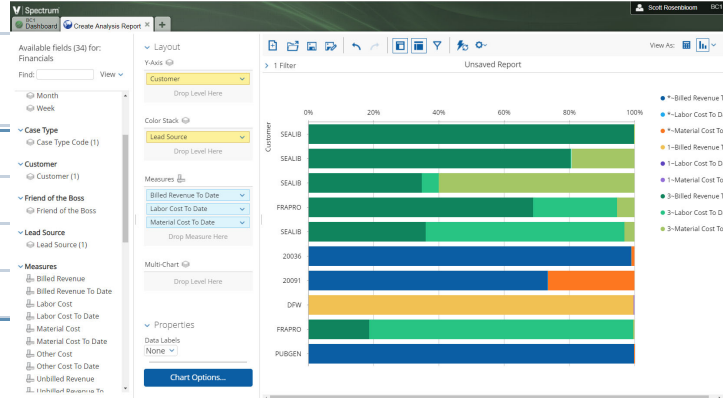
By PM / Super / Tech

By Contract Type

Supply Chain

Material Pricing

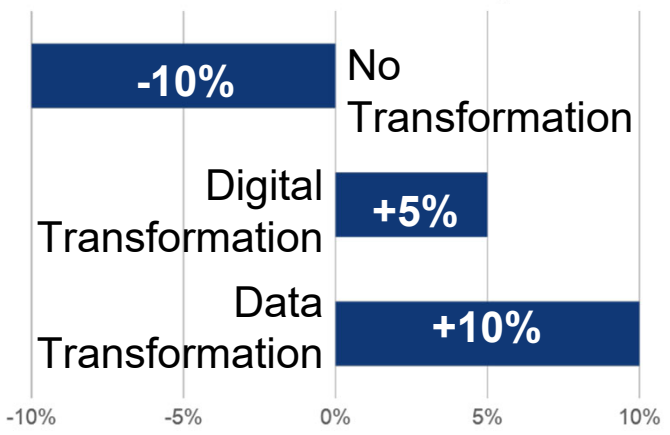
Delivery of Materials



## Data Transformation: Why It Matters



Construction Firm:  
Relative Profitability



## Data, Data, Where's the Data?

- Charlie's memory
- Paper Files
- Excel
- 3<sup>rd</sup> Party Systems
- ERP

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## Data, Data, Where's the Data?

# Silo'd data

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## Silo'd Data Questions

- How long does it take to run payroll?
- What is your process to create the WIP?
- How often does your team update their cost projections?
- How current are your billings?
- Does your project team have access to the latest job numbers?

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## Transform your Business

Reduce business process friction with a single data set.

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## Transform your Business



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## Single Data Set

### Two Paths

- Best of Breed
- Fully Integrated

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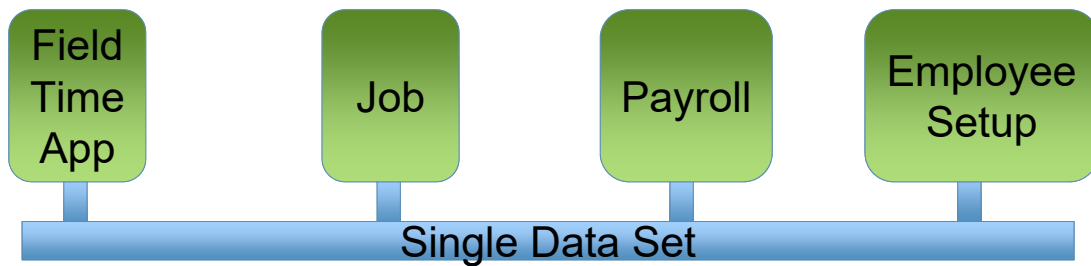
# Transforming your business



- Job #
- Phase/Cost Codes
- Cost Types
- Wage/Craft Codes
- Union Codes

- Employee #
- Default Wage/Craft Code
- Default Union Code

# Transforming your business

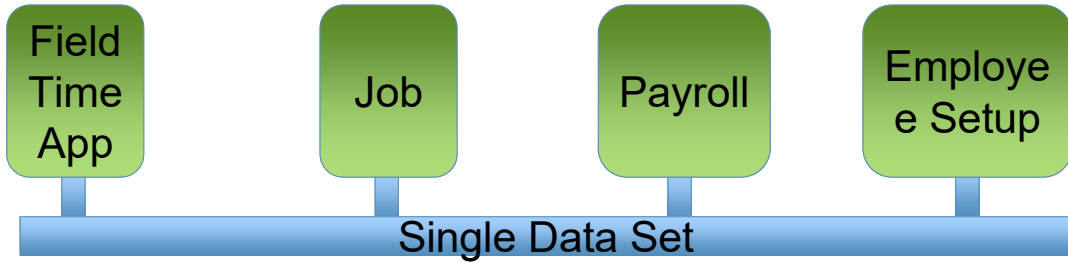


- Job Labor
- PTO
- Add-ons

- Job #
- Phase/Cost Codes
- Cost Types
- Wage/Craft Codes
- Union Codes

- Employee #
- Default Wage/Craft Code
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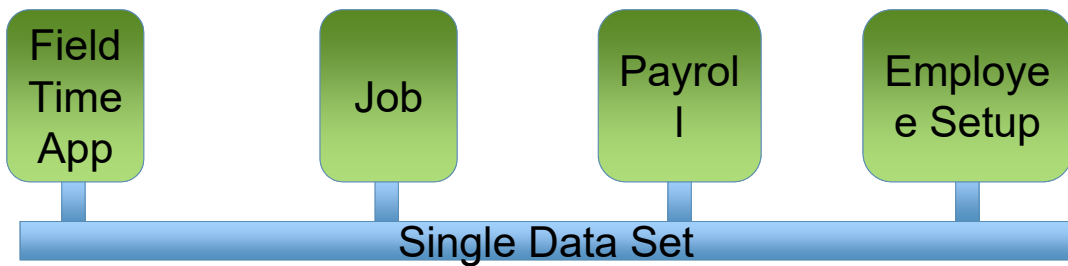
## Transforming your business



- Job Labor
- PTO
- Add-ons

- Job Cost data
- Employee Pay data

## Transforming your business



- Job Cost data
- Employee Pay data

## Single Data Set

- Individual packages from disparate vendors
- ### Best of Breed
- Accounting
  - Project Management
  - Service Management
  - Payroll
  - Field Data Collection
  - Financial Reporting

## Single Data Set

### Best of Breed

- Advantages
  - Focused Single-Purpose Packages

## Best of Breed Approach

Field Entry  
Time/Production/Materials

ERP

Integration

Analytics/  
Reporting

Field Service

### Best Practices

- Plan for integration
- Keys to tie objects together
  - Product Codes
  - Customer Codes
  - Vendor Codes
- Sandbox available for testing
- Control of updates/upgrades
- API's available to import/export data and objects

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## Best of Breed Approach

Field Entry  
Time/Production/Materials

ERP

Integration

Analytics/  
Reporting

Field Service

### Challenges

- Correlation of data across systems
- Consistency of data
- System upgrades destroys integration
- Data Synchronization
- Expert IT Staff
- Who is responsible if something breaks
- Cost

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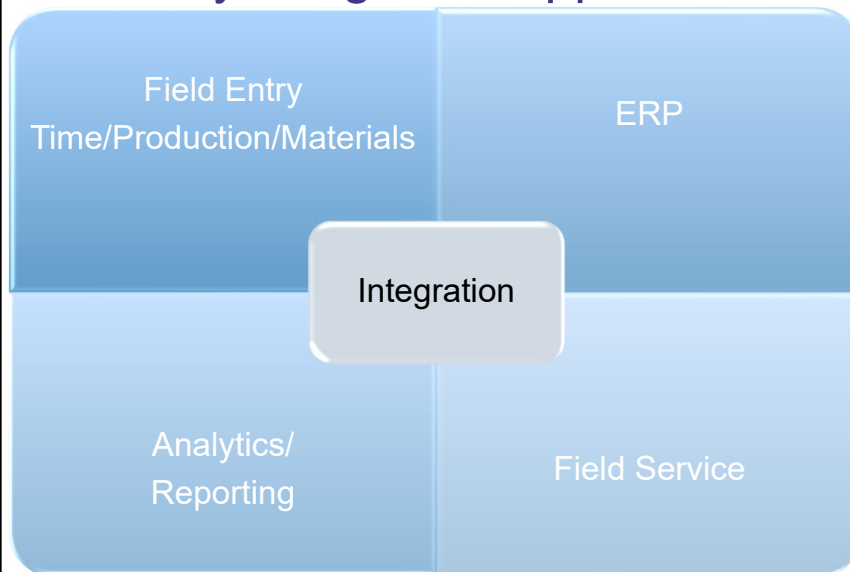
## Single Data Set

### Fully Integrated System

- Advantages
  - True Single Data
  - One neck to choke
  - Changes to one part of system won't crash others
  - Less cost
  - Less staffing

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### Fully Integrated Approach



#### Best Practices

Plan for integration

Keys to tie objects together

- Product Codes
- Customer Codes
- Vendor Codes

Sandbox available for testing

Control of updates/upgrades

API's available to import/export data and objects

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## Fully Integrated Approach

The diagram illustrates a 'Fully Integrated Approach' with four main components arranged in a 2x2 grid, all connected by a central 'Integration' hub:

- Top-Left:** Field Entry (Time/Production/Materials)
- Top-Right:** ERP
- Bottom-Left:** Analytics/Reporting
- Bottom-Right:** Field Service

**Integration**

### Challenges

- Lack of Depth in any one Feature
- Not the right set of features
- No API's
- Stuck with one vendor
- Lack of investment
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