



WRITING CASE STUDIES: How to Make a Great Living by Helping Clients Tell Their Stories

MODULE 5

Writing Your Case Study Draft

Sample Storyboard



AMERICAN WRITERS & ARTISTS INC.

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Sample Storyboard

Note: *This storyboard corresponds to the **Project DocControl** case study sample included with this program. You may want to look at them side by side so you can see how this all came together.*

■ 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.

The company does both new construction and renovation work.

Established in 1960 by Gordon Harbuck and is 95 percent employee-owned.

Still a growing company.

Employs nearly 300 field personnel and works on projects up and down the west and east coasts of Florida.

■ CHALLENGES

Document management was becoming a big challenge by the late 1990s.

Had no standardized document management process. Everyone was doing their own thing – a combination of word-processing programs, spreadsheets, three-ring binders and file folders.

When problems came up, finding the documentation to defend the company's position would take hours. Many times, the documentation just wasn't there.

Zenoniani tried creating a peer-to-peer network and a series of standardized templates.

But by 1999 it was obvious that this was inadequate. Everyone reverted to what they were most comfortable using. This 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

Zenoniani was approached by **Project DocControl**. Within a few minutes of seeing the system in action, he realized that this is what they needed.

Was simple to use and used the terminology they were used to. Looked at everything from the subcontractor's point of view.

Purchased **Project DocControl** in September 1999. Got started with three or four user licenses.

Since then, they've 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.

■ RESULTS

Greater Project Management Efficiency

They've increased their productivity significantly. Standardizing on creating, managing and tracking project documentation = everyone can produce and find what they need faster. Allows them to focus on other important tasks.

Documenting projects 40 to 50 percent faster. Which means they can now handle much more than they could before, which has kept the company from having to hire more support staff.

Also means they can be more agile and flexible when conditions change or personnel need to be reallocated.
Example: when a project manager is out on vacation.

Actual example of recent change of project manager in one of their projects and how smoothly that transition went because of the system.

Improved Visibility into Projects

Centralizing all project documentation = 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.

Company's foremen having access to the system and continually logging important information = Zenoniani can get a thorough and accurate picture of project health.

Example: Can quickly see which change order requests are complete, pending, still assembling costs on. From a billing and cash flow standpoint, this is huge!

Reduced Risk

Has enabled B&I to reduce its risk exposure. *Example:* During closeout phase of a large project, questioned on whether the building's ductwork had been tested. In less than 2 minutes, was able to find and send the test results directly from the system to the GC. Would have taken hours before.

Streamlined Change Order and Pay Application Process

Another huge area. Prior to **PDC**, their accounting staff was entering all payment applications and schedules of value information directly into the company's accounting system. Very time-consuming and inflexible way to do this.

With **PDC**, they've cut multiple steps and lots of time from the process.

Project managers fill out the information in **PDC**, accounting enters the transaction summary in the accounting system. Takes just a few seconds to do (because all the detail has already been entered in **PDC**).

Means they can get paid faster. And if something changes, it's very easy to go back into **PDC** and make that change.

Still using only one person to do all their billing. Would need at least one more FTE to do this otherwise.

Ending

Zenoniani: **PDC**'s commitment to continually improving the system is important. **PDC** always soliciting their feedback. Always trying to make it better and basing their decisions on what customers need to make their jobs easier.