



# How a Single Data Set Can Transform Your Business

Presented by Scott Rosenbloom & Mark Schwartz

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# Scott Rosenbloom

*Vice President, Analytics*

- Leads Viewpoint's Analytics group, driving big data, machine learning and artificial intelligence initiatives
- Spent the last 5 years at Dexter + Chaney and Viewpoint helping contractors get their teams working in one common set of data to enable better decision-making and better business outcomes
- Spent 8 years working in product and sales roles in Microsoft's Server and Cloud division





# Mark Schwartz

*Senior Product Manager, Spectrum by Viewpoint*

- Responsible for product life cycle, strategic planning and successful release of new operations functionality in Viewpoint's Spectrum construction software
- Has over 15 years of experience in construction software sales and product management

# Transform Your Business

Bad Ideas





# Transform Your Business

- Hire new management!



# Transform Your Business

- Hire new management!
- Hire better staff!



# Transform Your Business

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





# Transform Your Business

Better Idea:  
Work the Fundamentals



# Transform Your Business

## Work the Fundamentals

- Collect Data



# Transform Your Business

## Work the Fundamentals

- Collect Data
- Report Data





# Transform Your Business

## Work the Fundamentals

- Collect Data
- Report Data
- Make Data-Driven Decisions



# Transform Your Business

## Work the Fundamentals

- Collect **Data**
- Report **Data**
- Make **Data**-Driven Decisions



# Transform Your Business

Data is the backbone  
of your business.





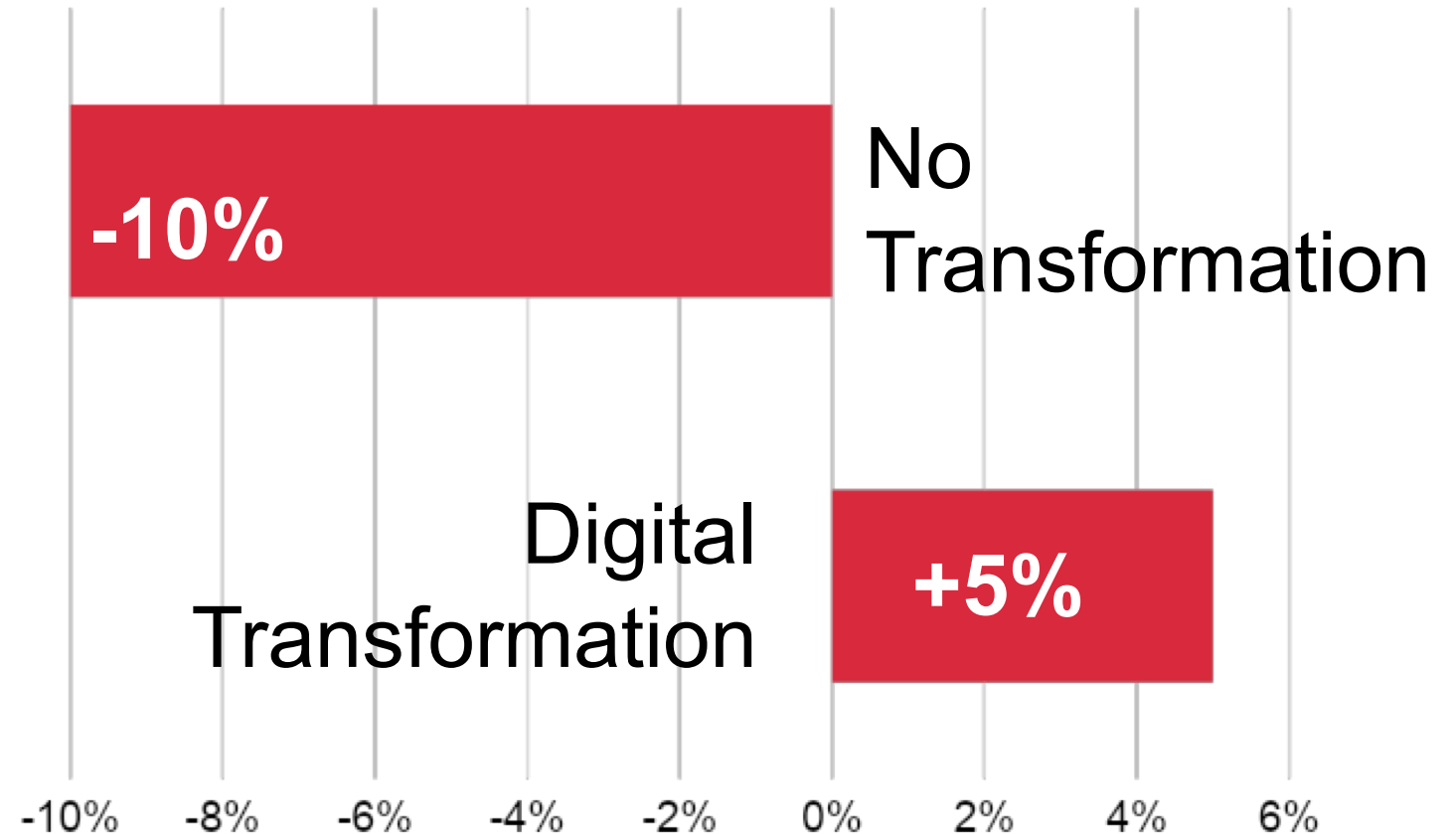
# Digital Transformation



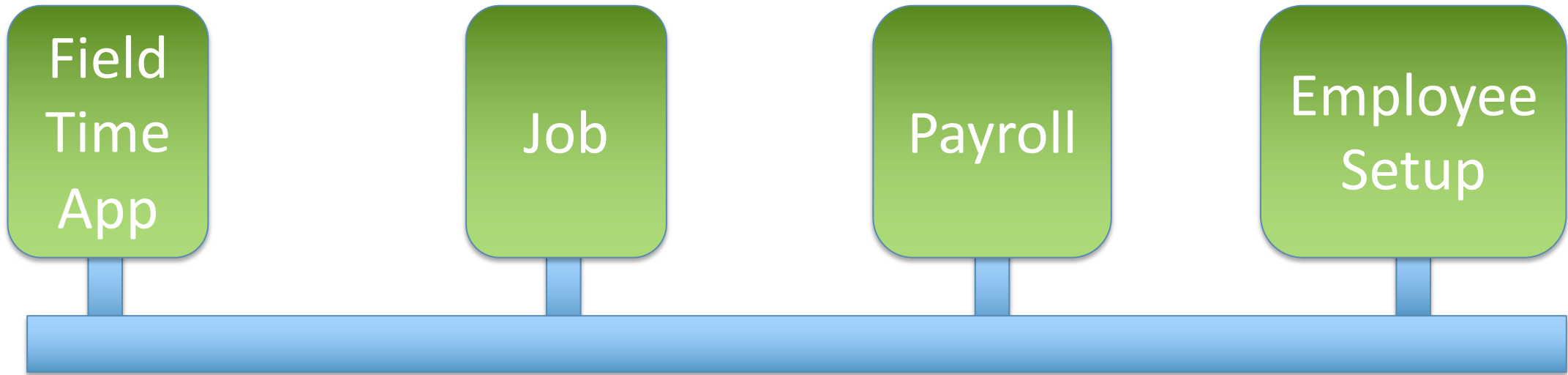
# Digital Transformation: Why It Matters



Construction Firm:  
Relative Profitability

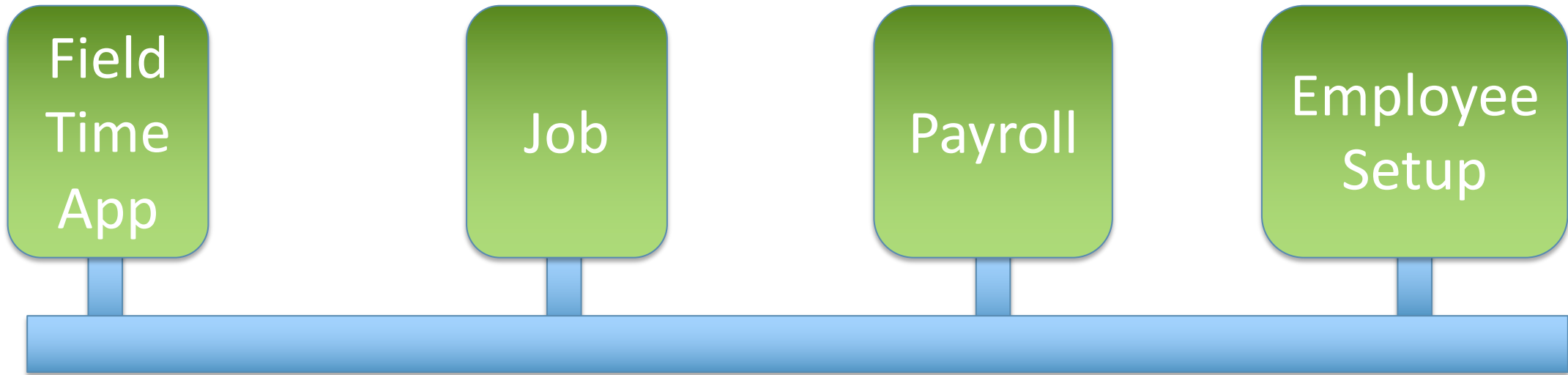


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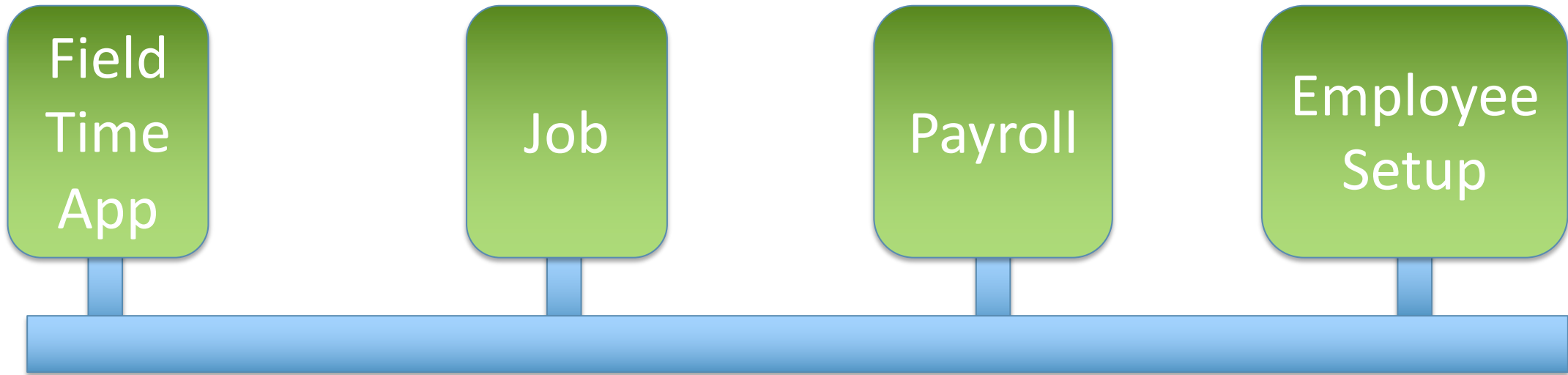


# Digital Transformation



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

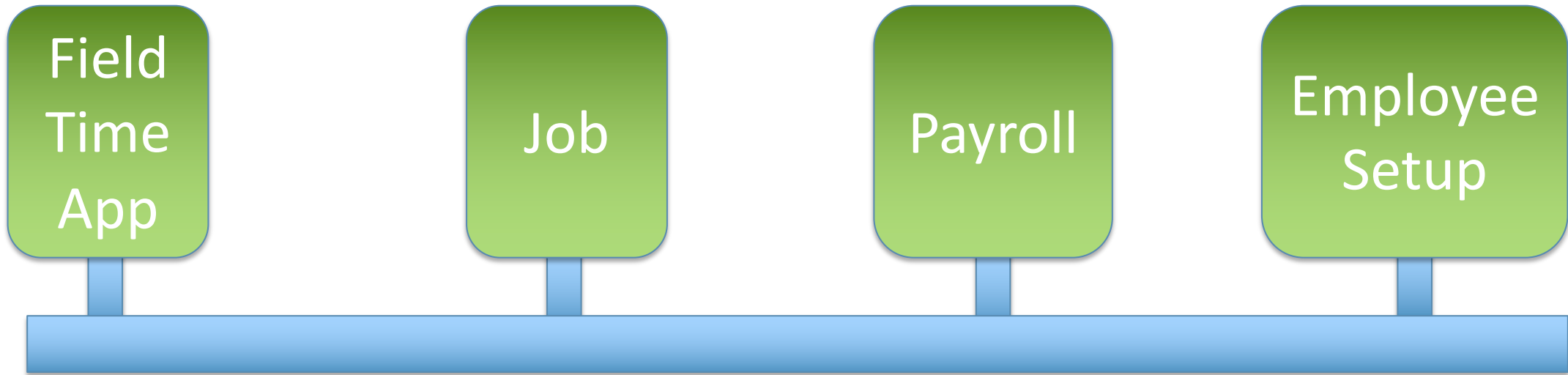
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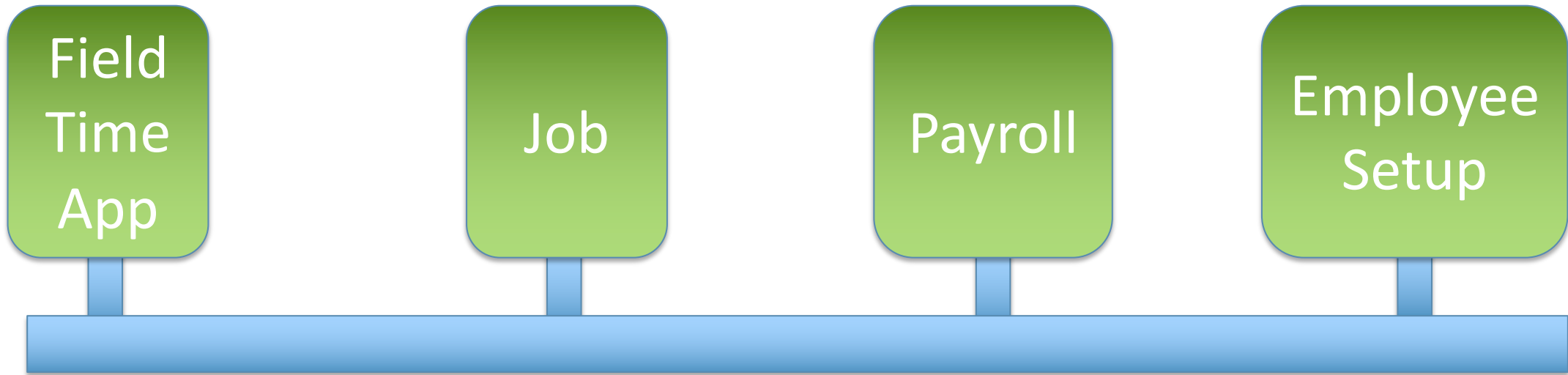
- Employee #
- Default Wage/Craft Code
- Default Union Code

# Digital Transformation



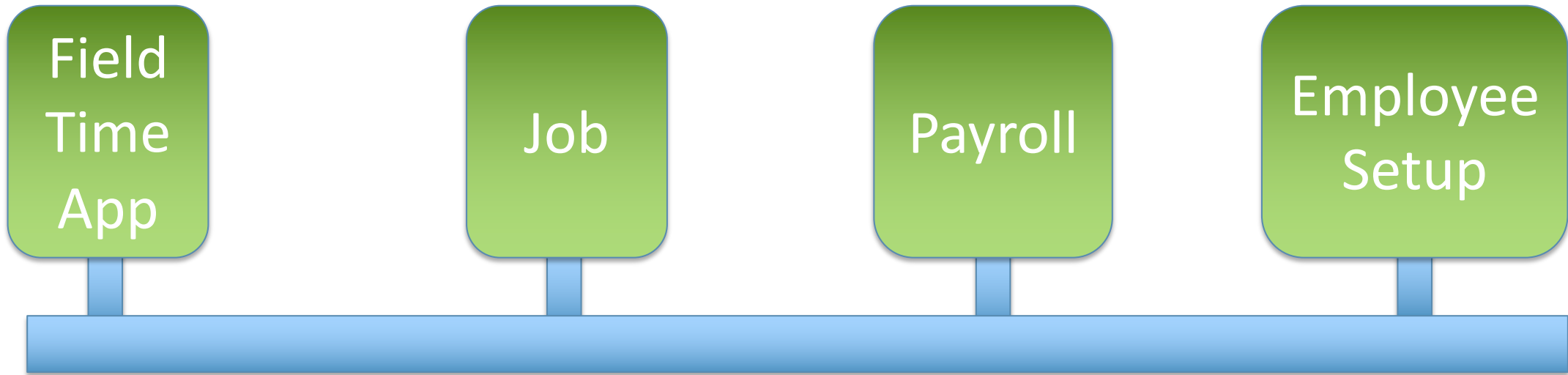
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# Digital Transformation



- Job Labor
- PTO
- Add-ons

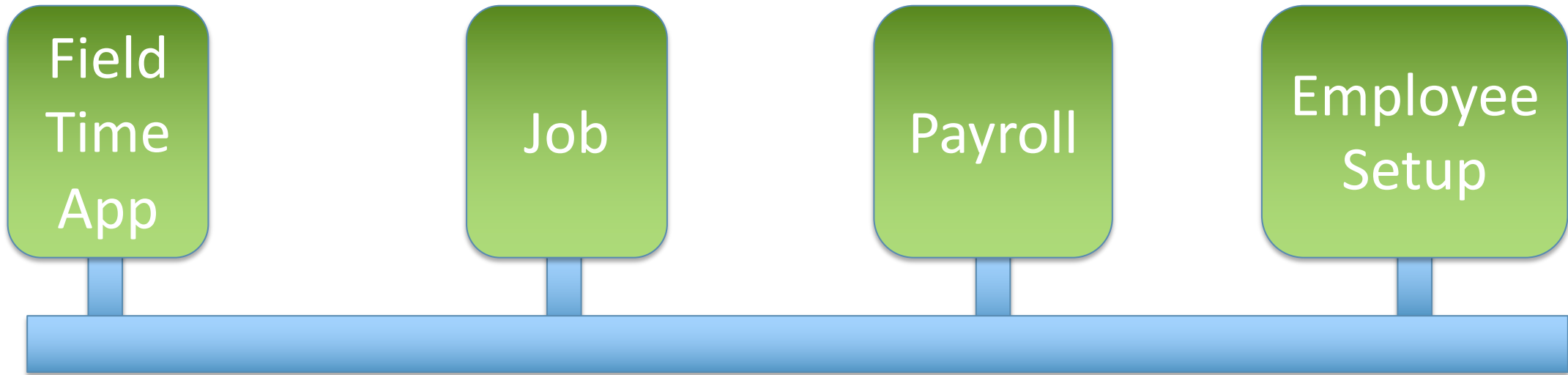
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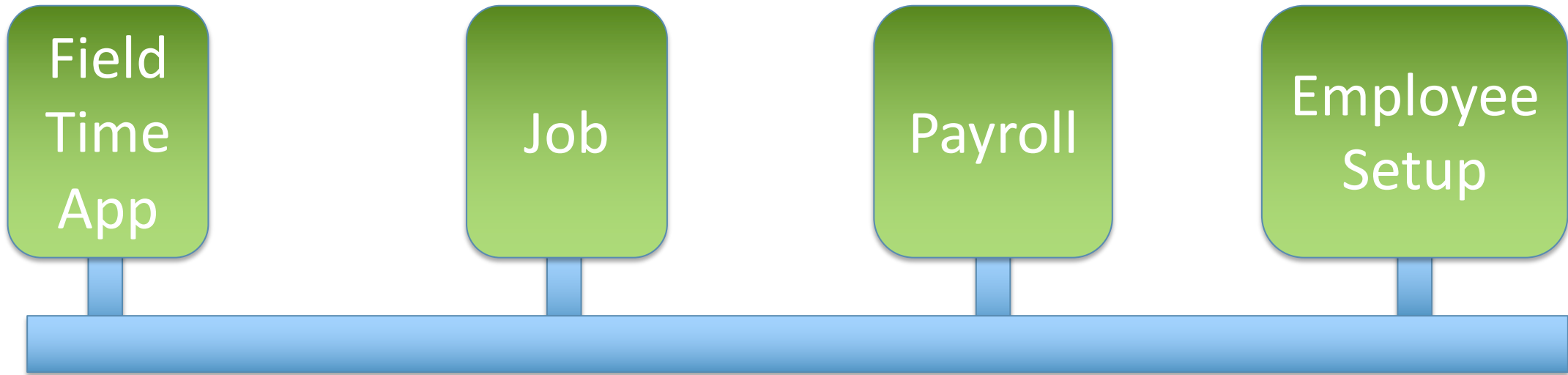


# Digital Transformation



- Job Cost data
- Employee Pay data

# Digital Transformation



- Job Cost data

- Employee Pay data

# Digital Transformation

## Two Paths

- Single-Purpose Packages
- Fully Integrated



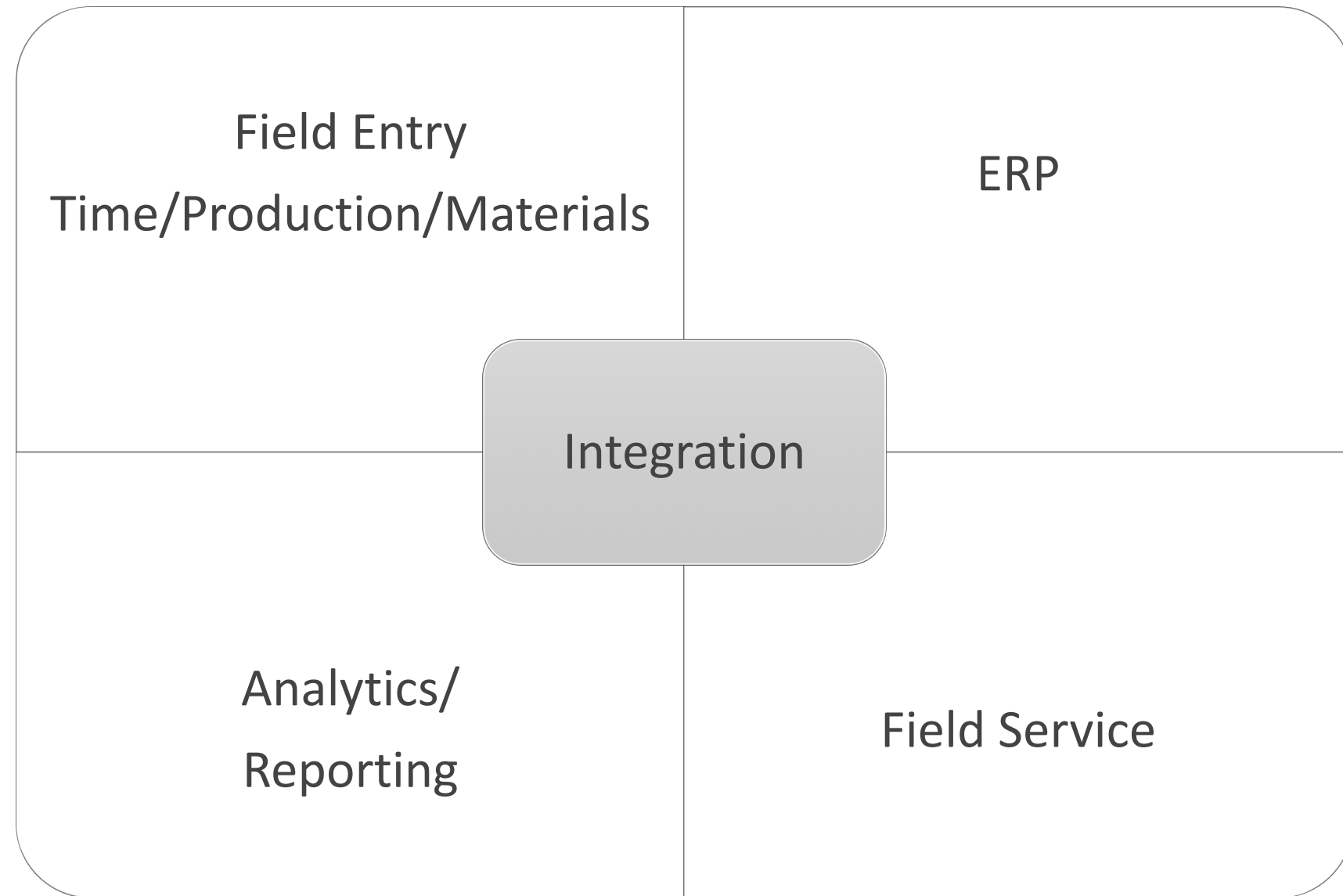
# Digital Transformation

## Single-Purpose Packages

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



# Single-Purpose Packages Approach

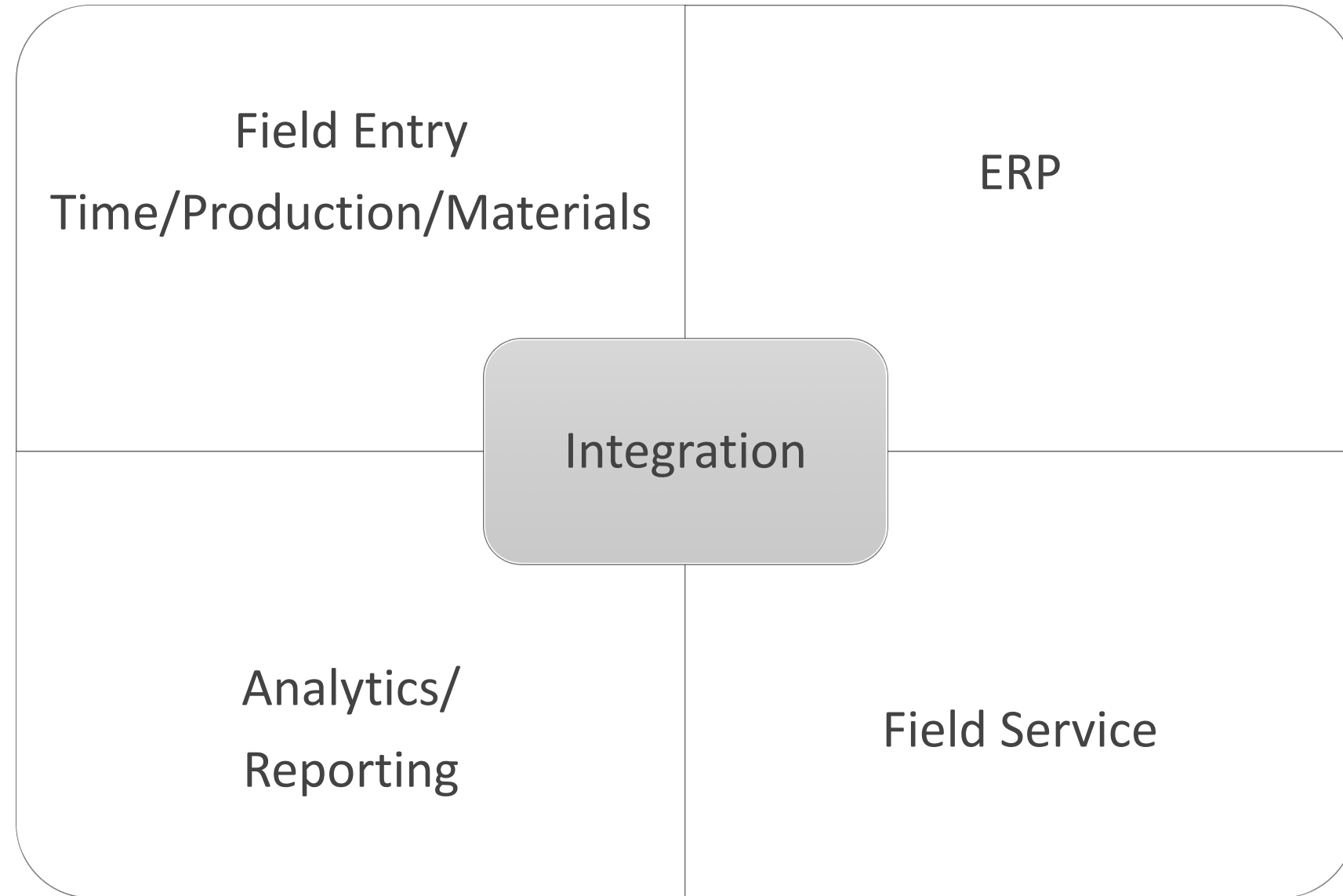


## Best Practices

Plan for integration



# Single-Purpose Packages Approach



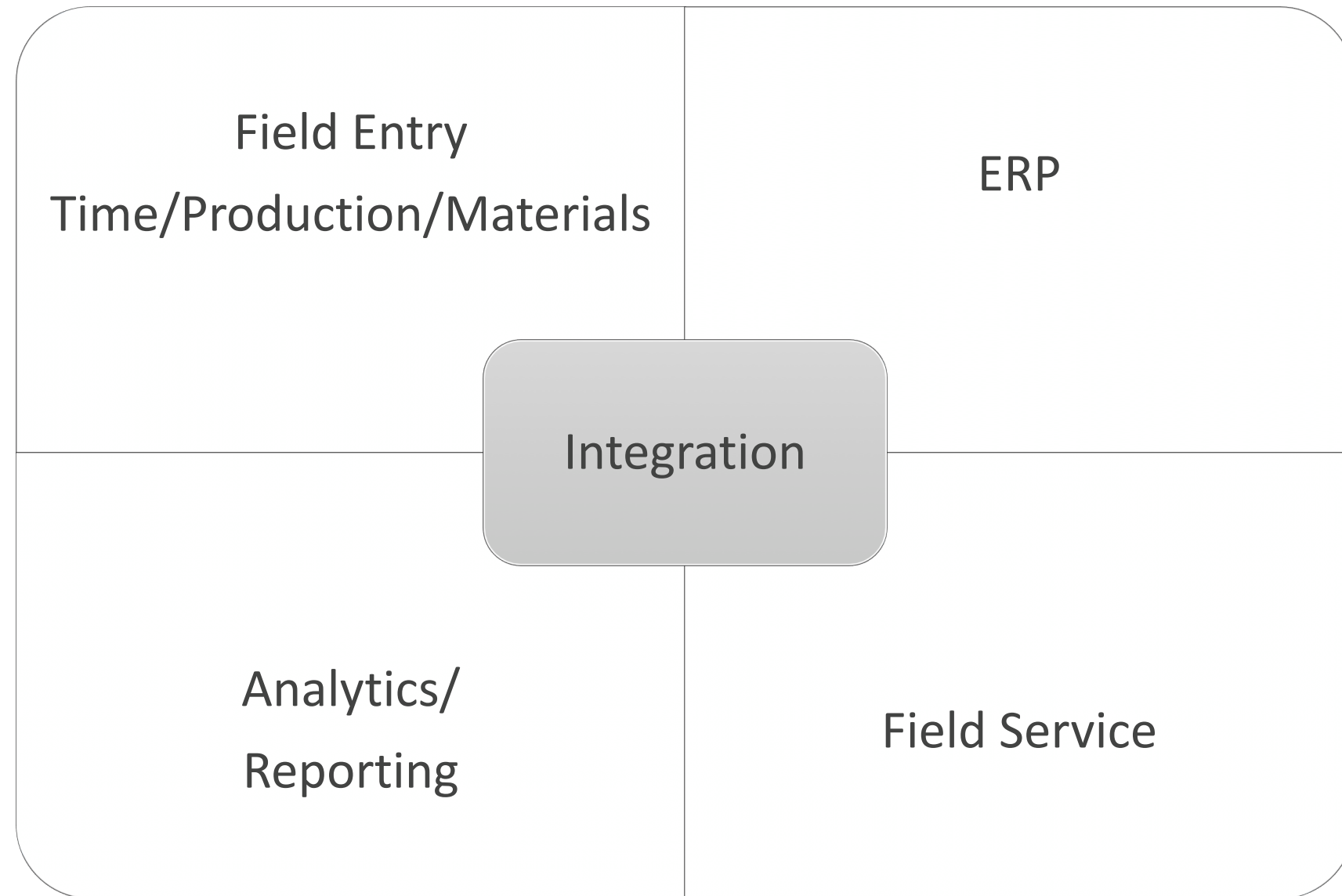
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Keys to tie objects together

- Product Codes
- Customer Codes
- Vendor Codes

# Single-Purpose Packages Approach



## Best Practices

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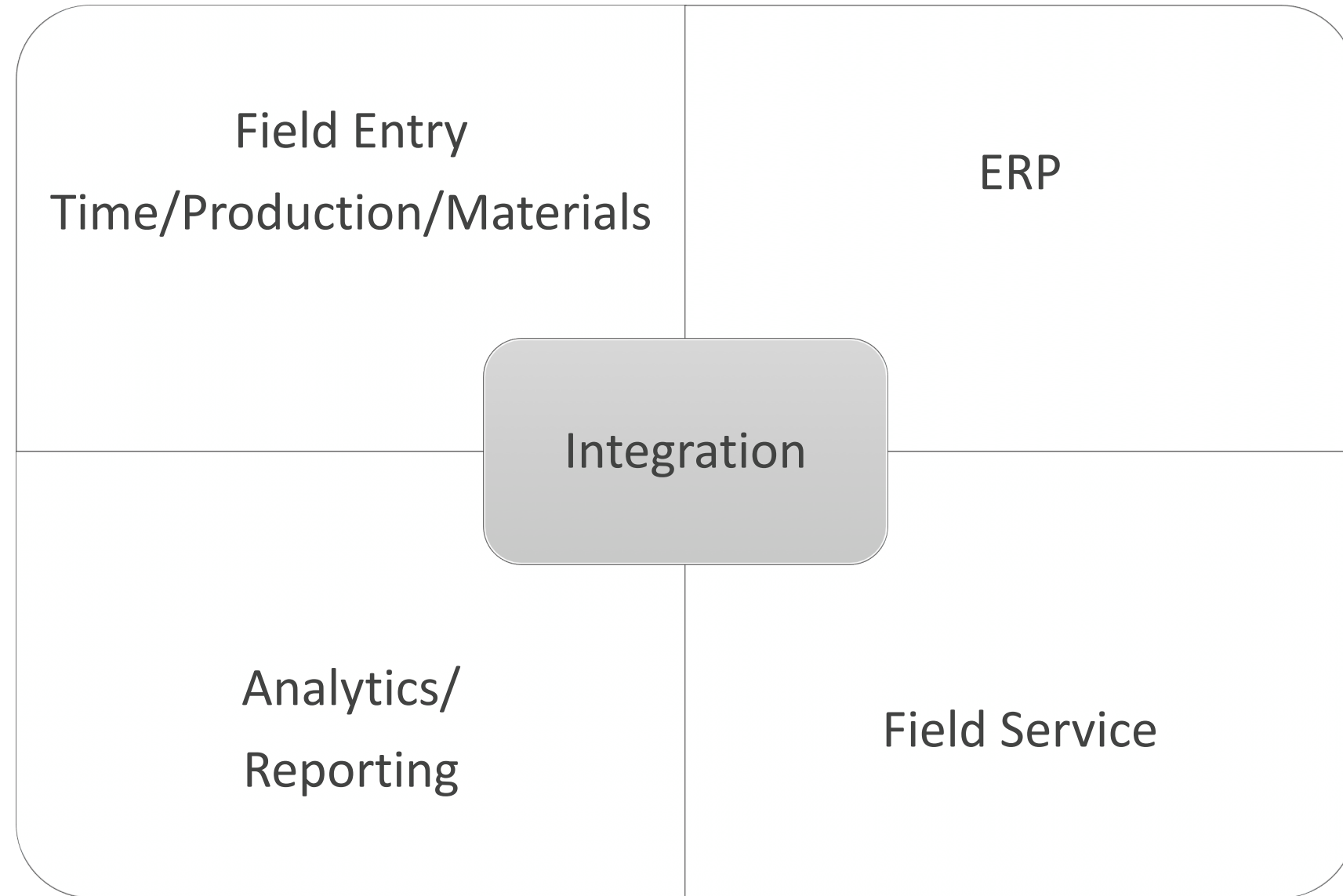
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Sandbox available for testing



# Single-Purpose Packages Approach



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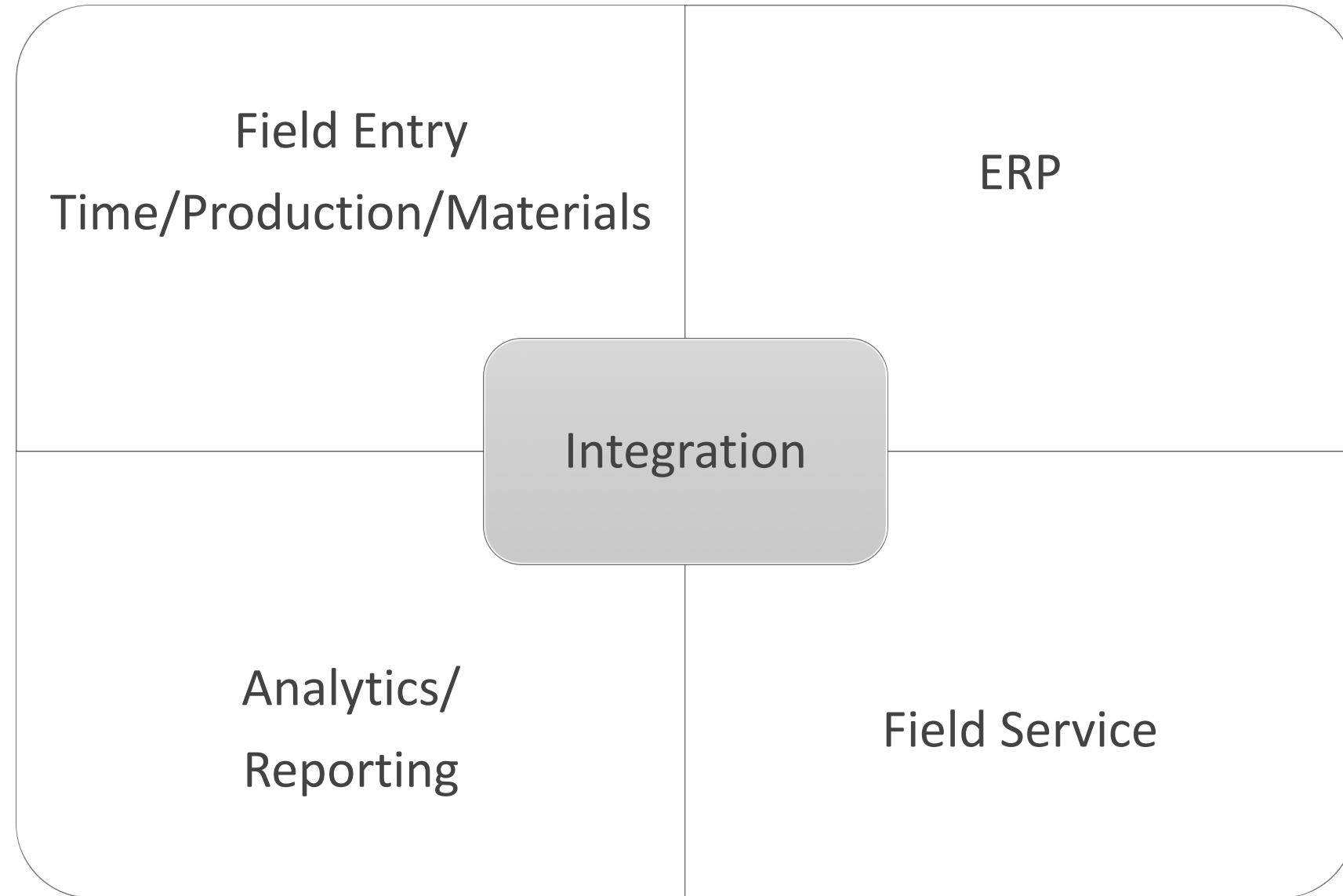
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Control of updates/upgrades

# Single-Purpose Packages Approach



## Best Practices

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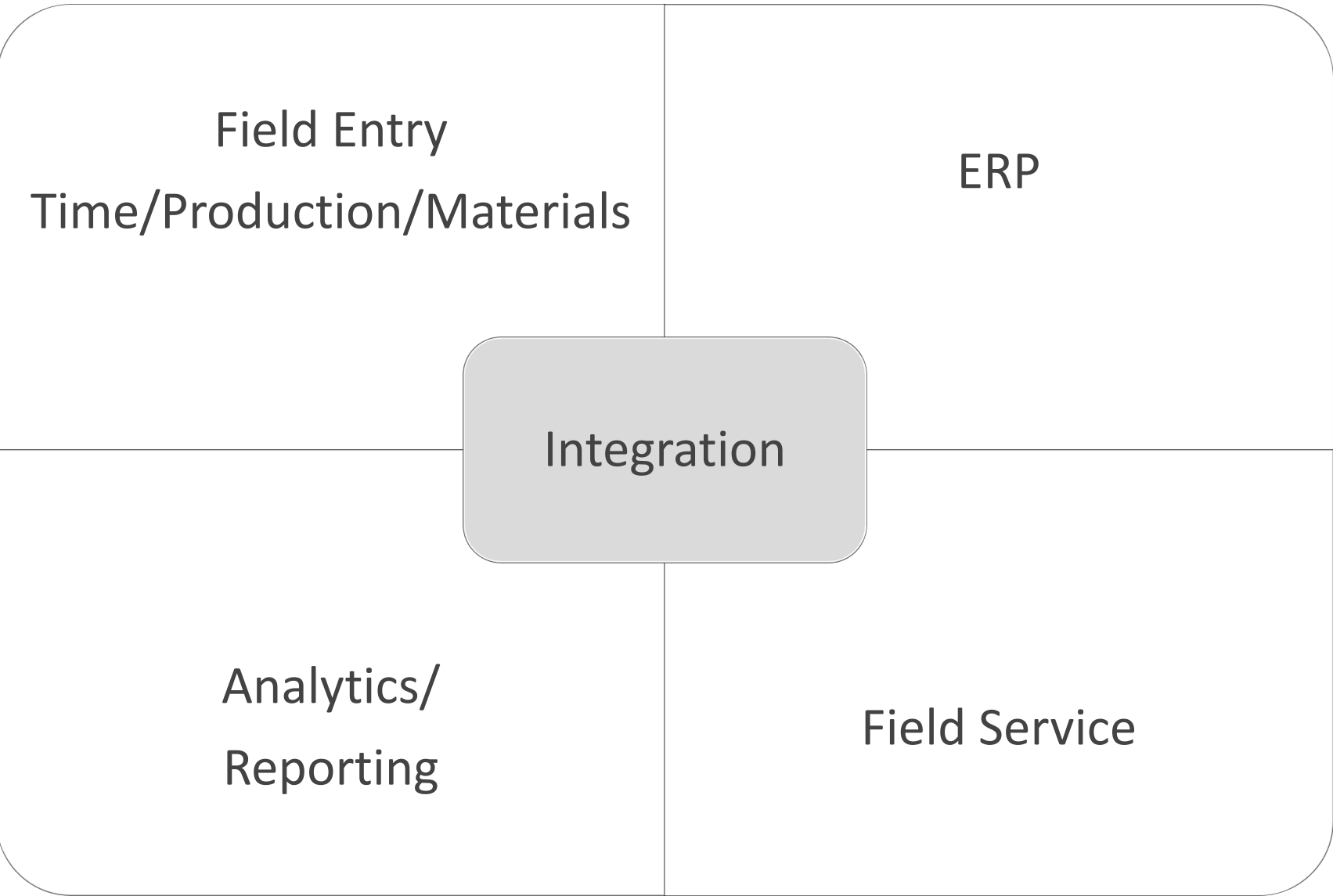
- Product Codes
- Customer Codes
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Sandbox available for testing

Control of updates/upgrades

API's available to import/export data and objects

# Single-Purpose Packages Approach

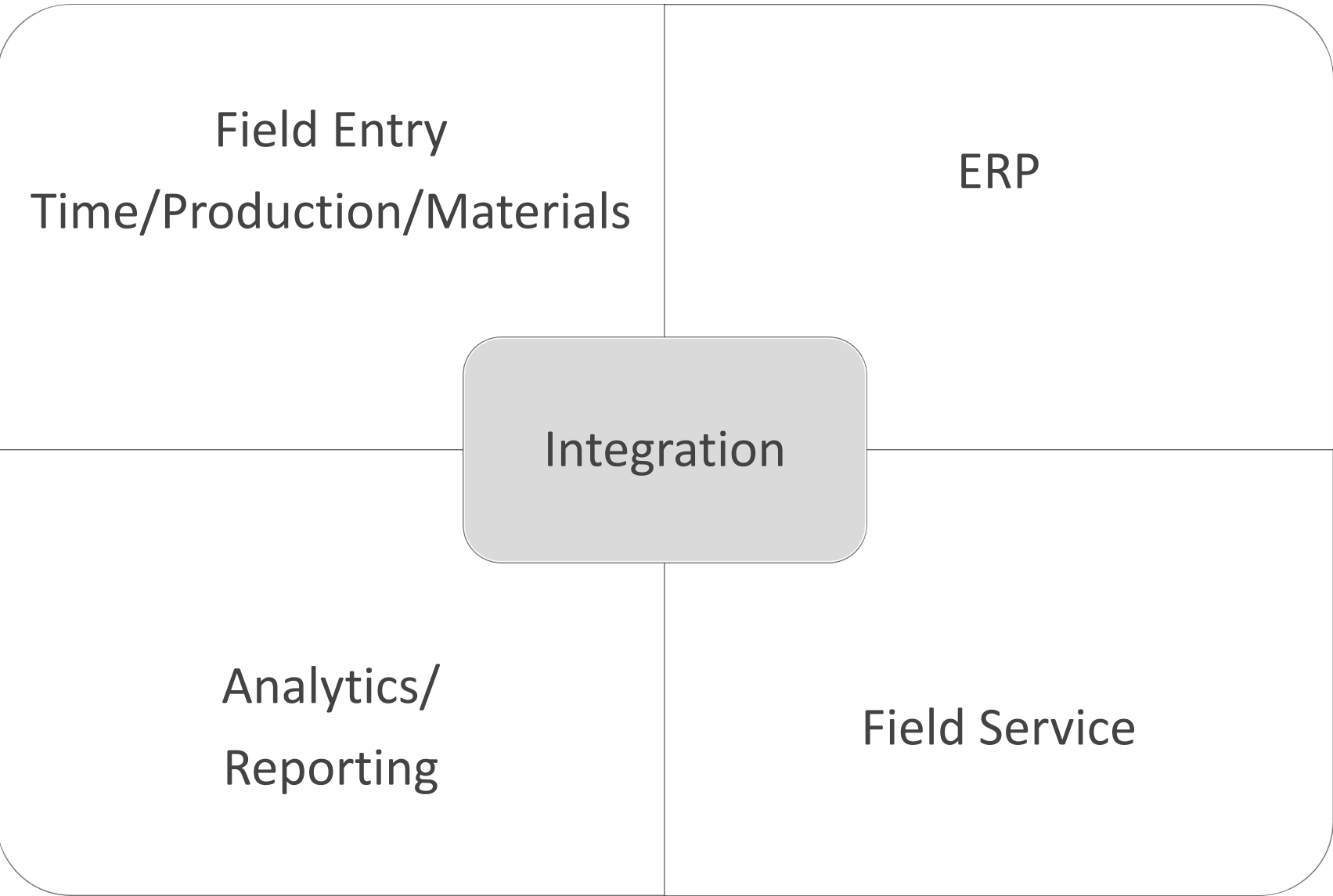


## Challenges

Correlation of data across systems



# Single-Purpose Packages Approach



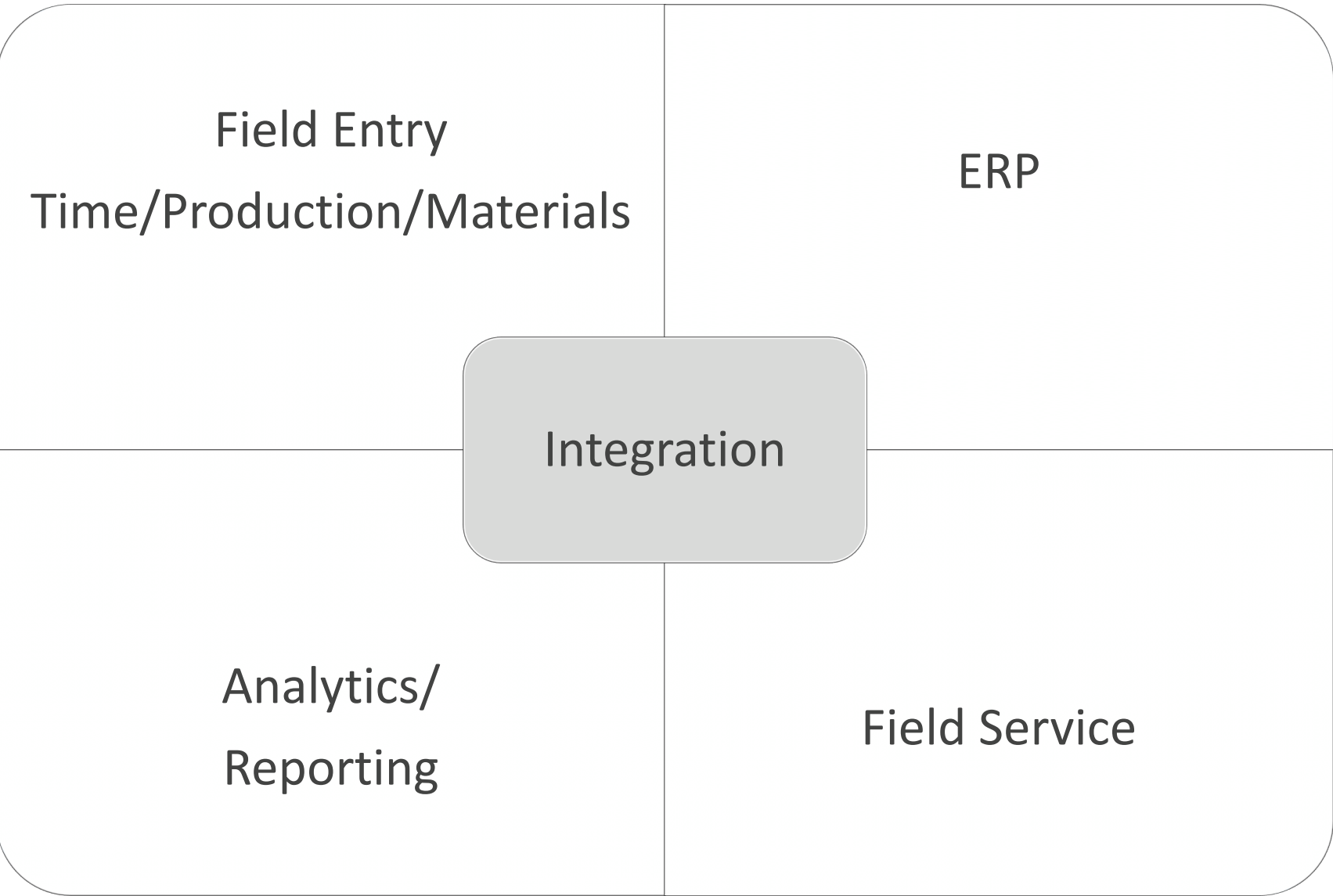
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Correlation of data across systems

Consistency of data



# Single-Purpose Packages Approach

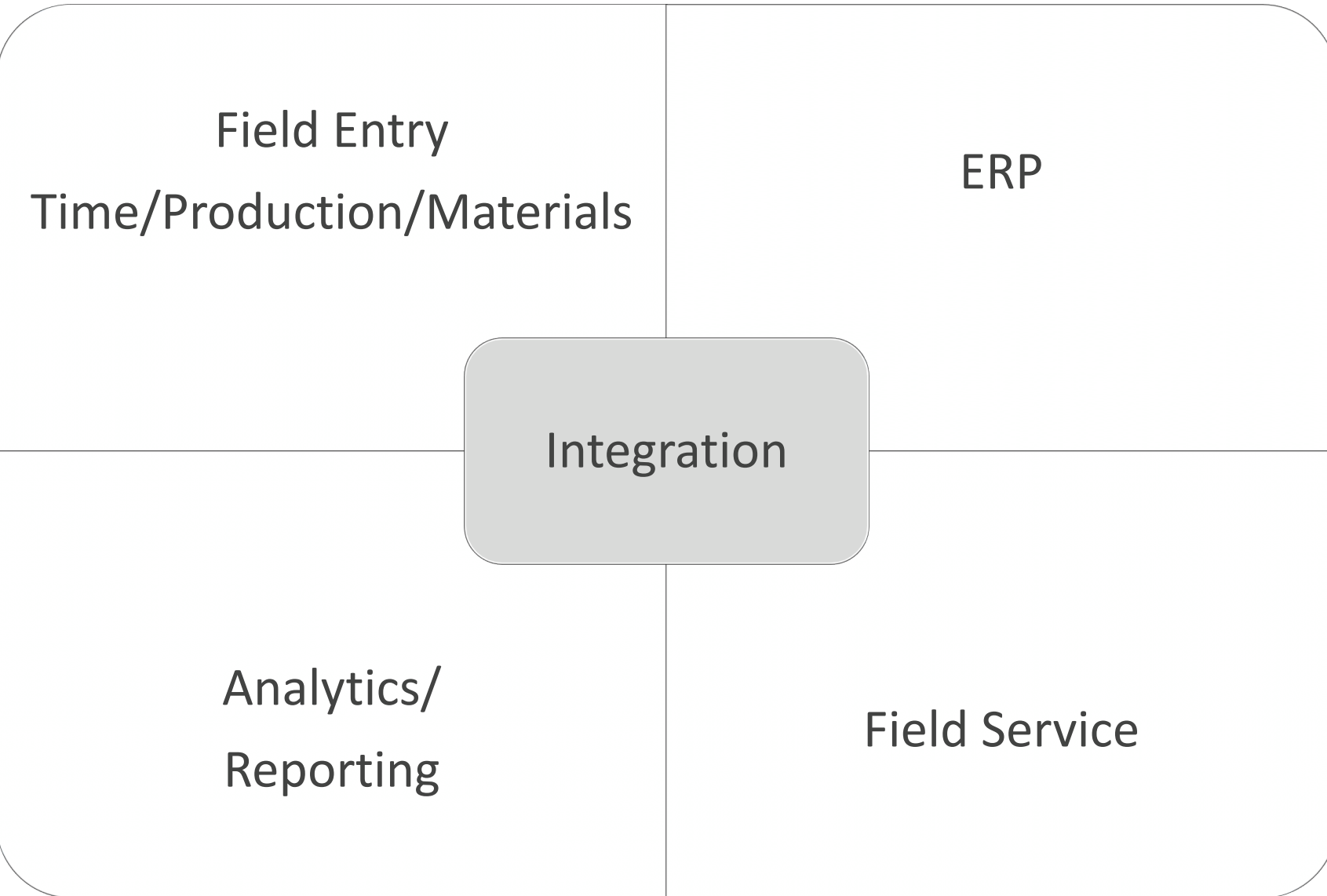


## Challenges

- Correlation of data across systems
- Consistency of data
- System upgrades destroys integration



# Single-Purpose Packages Approach



## Challenges

Correlation of data across systems

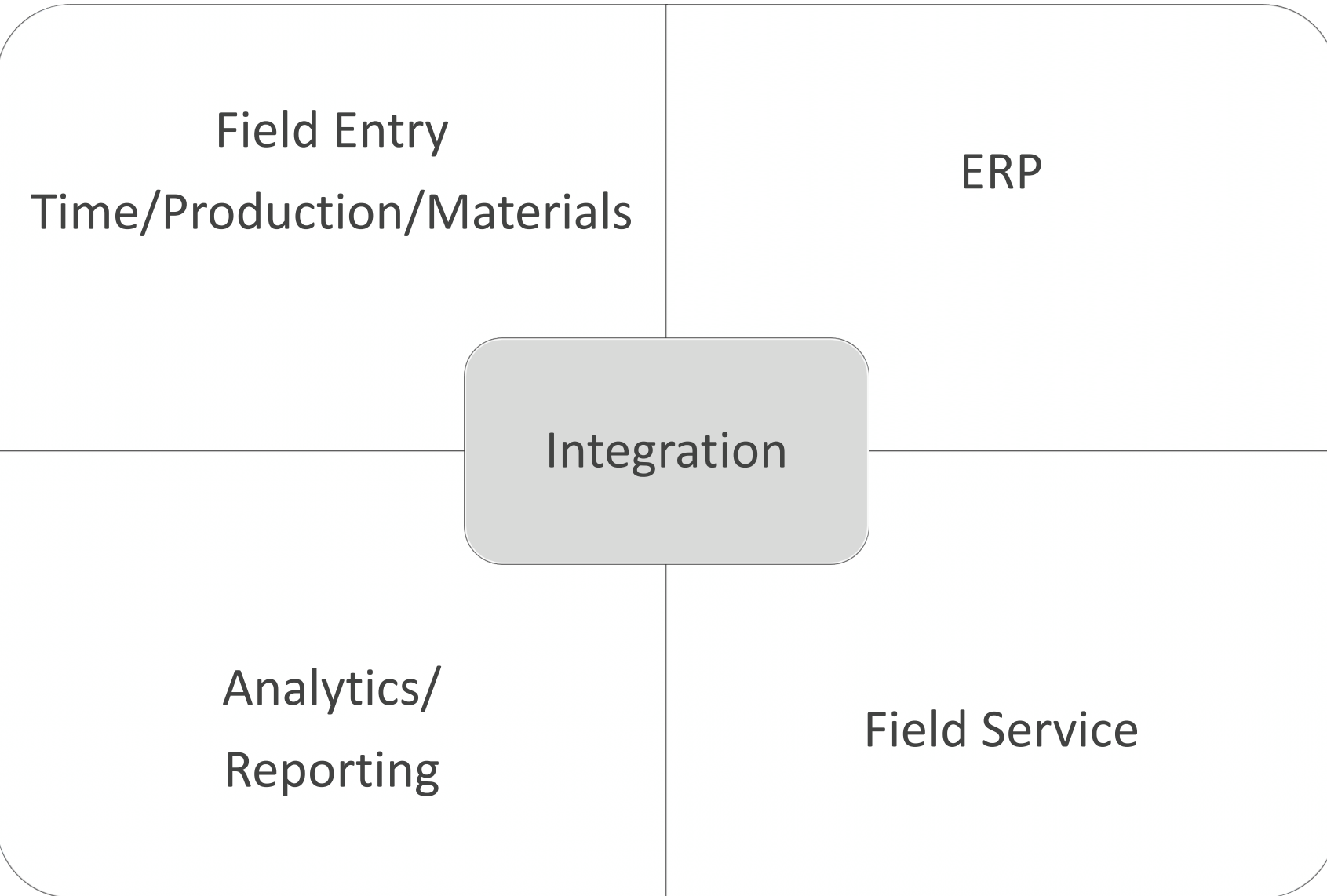
Consistency of data

System upgrades destroys integration

Data Synchronization



# Single-Purpose Packages Approach



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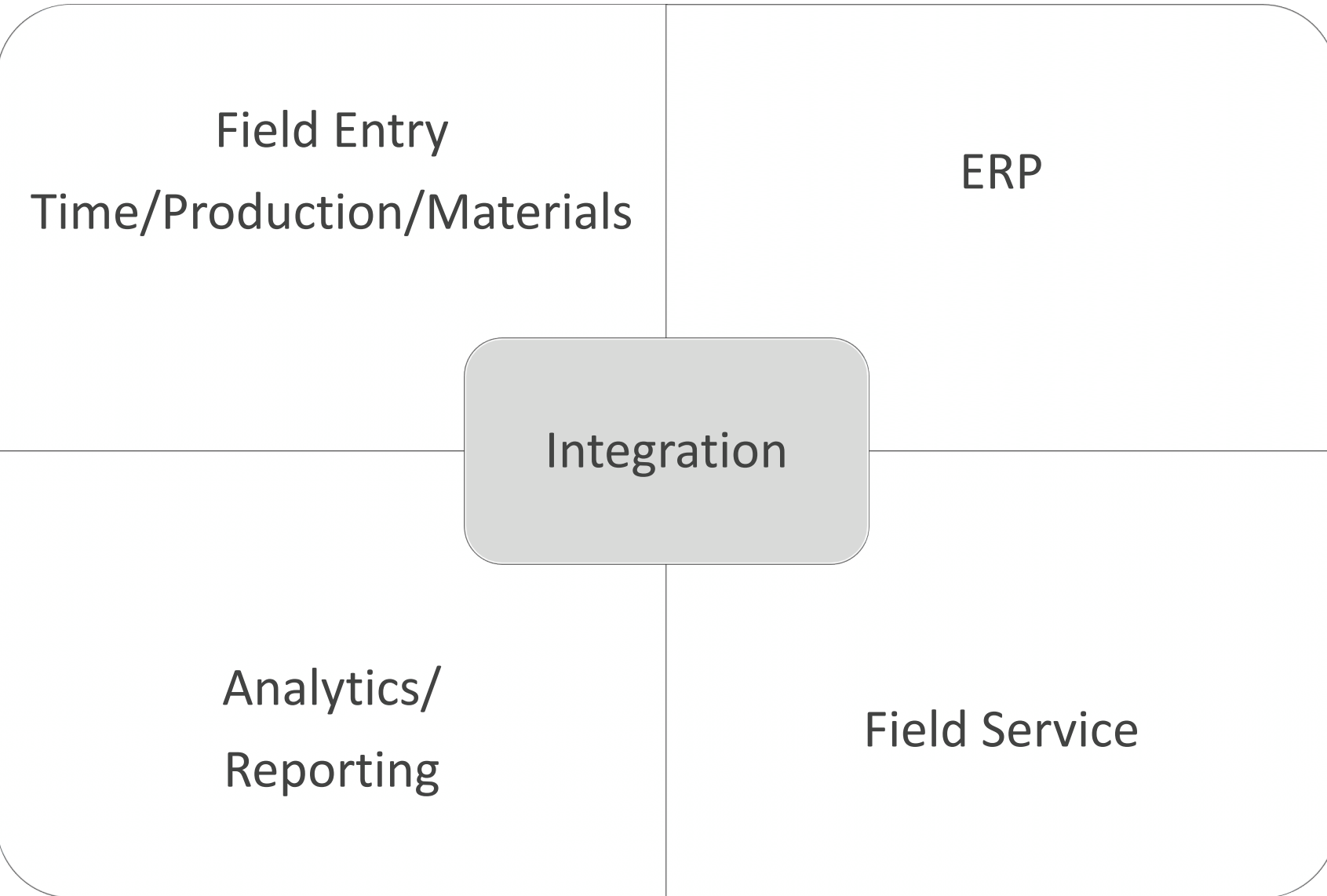
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Data Synchronization

Expert IT Staff

# Single-Purpose Packages Approach



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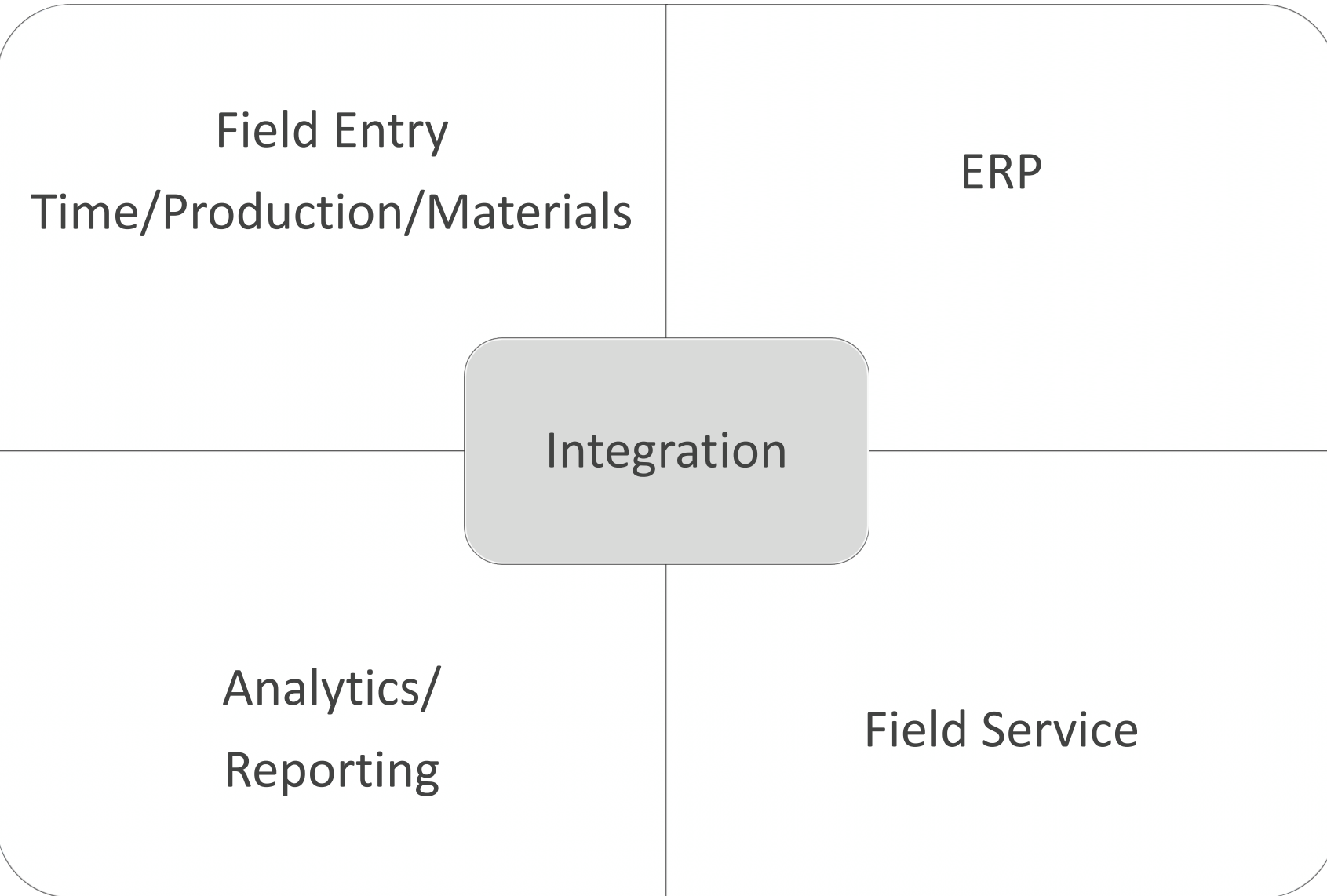
Data Synchronization

Expert IT Staff

Who is responsible if something breaks



# Single-Purpose Packages Approach



## 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

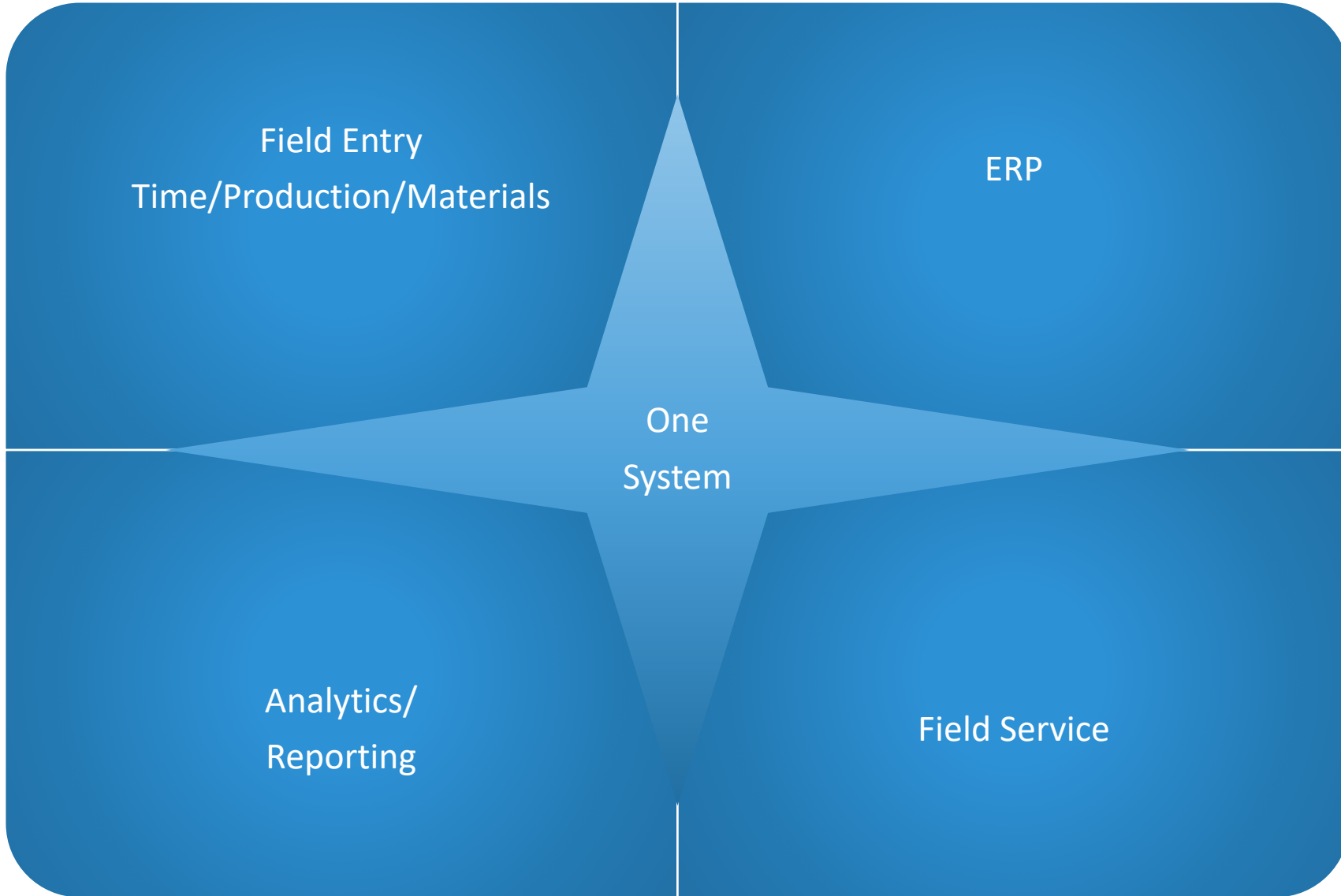
# Digital Transformation

## Fully Integrated System

- Single source of the truth
- One throat to choke
- Changes to one part of system won't crash others
- Less cost
- Less staffing



# Fully Integrated Approach

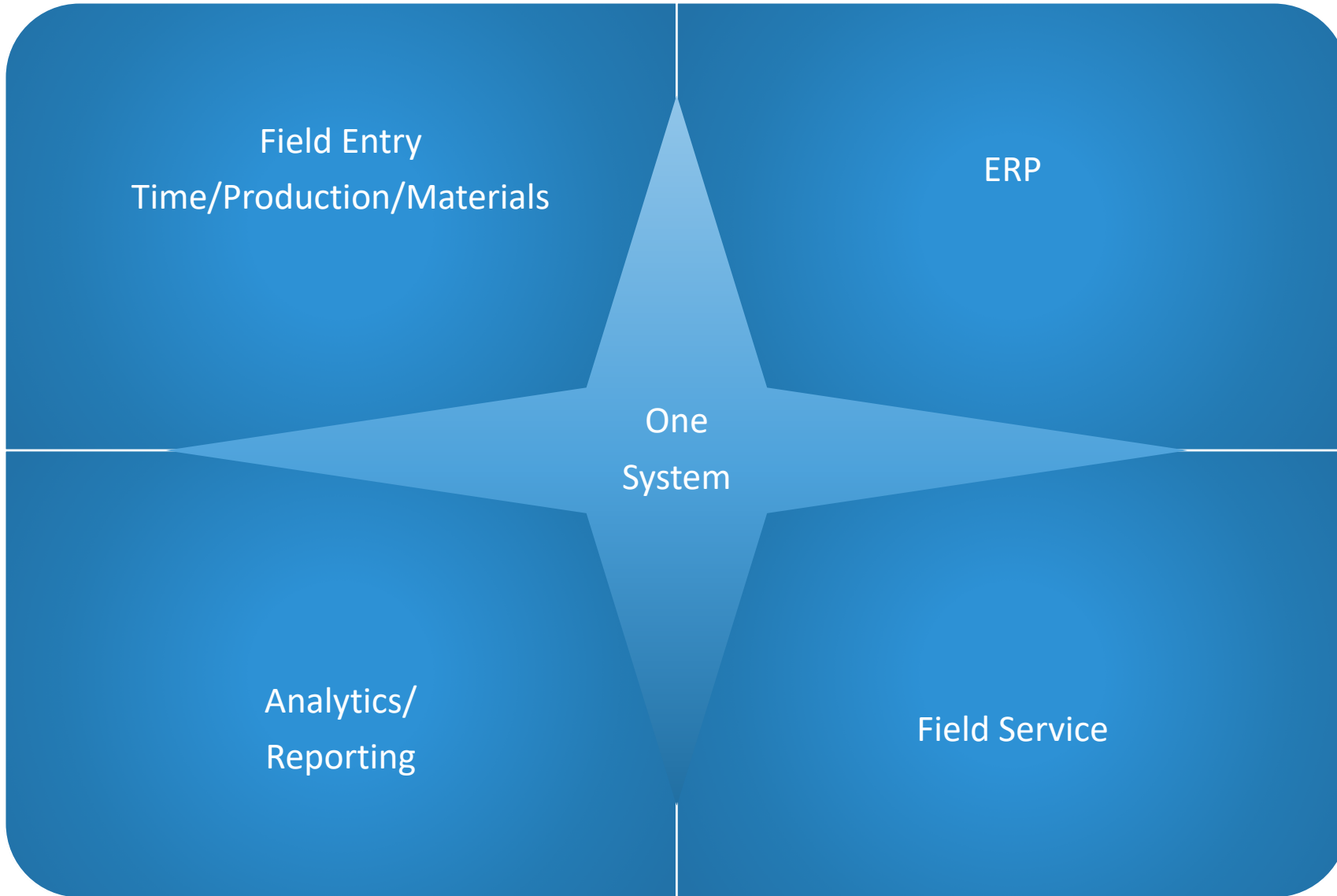


## Best Practices

Make sure the key components work for your business



# Fully Integrated Approach



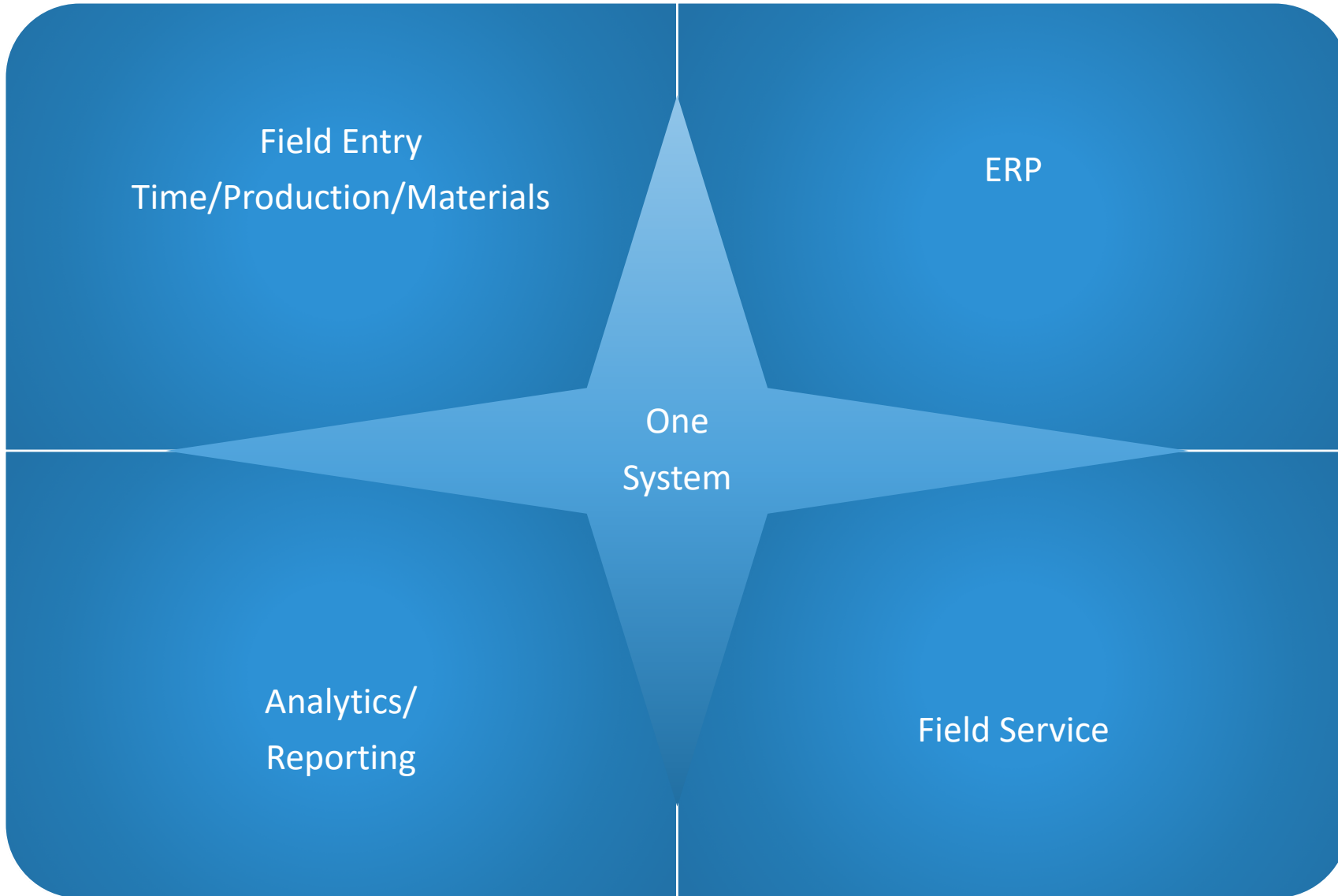
## Best Practices

Make sure the key components work for your business

Make sure system will support growth

- Volume
- Feature Set
- Vendor Stability

# Fully Integrated Approach



## Best Practices

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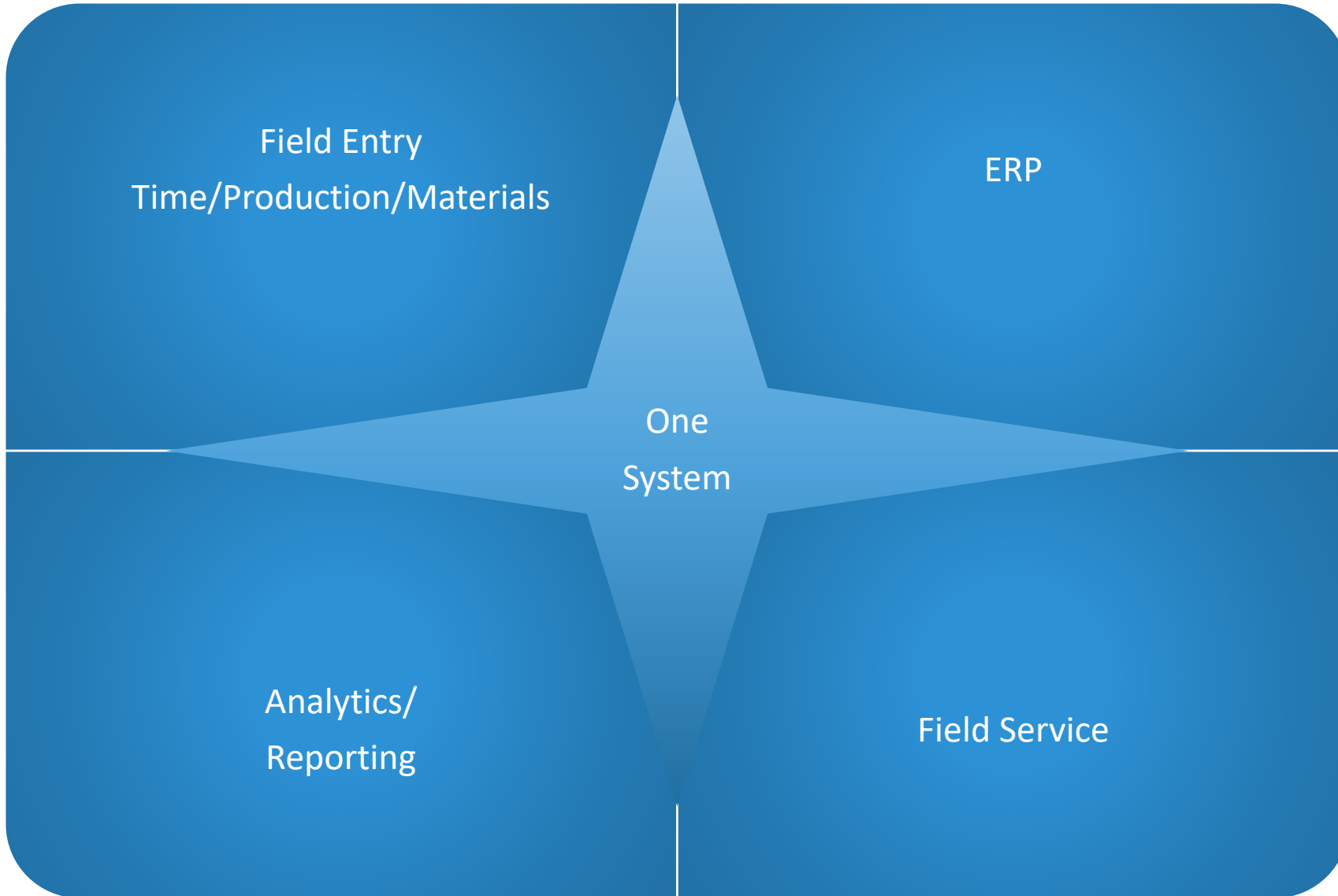
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Data is easily accessed

- Canned Reports
- Custom Reporting
- Dashboards/KPI

# Fully Integrated Approach



## Best Practices

Make sure the key components work for your business.

Make sure system will support growth

- Volume
- Feature Set
- Vendor Stability

Data is easily accessed

- Canned Reports
- Custom Reporting
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Easy way to incorporate third-party packages or custom development



# Fully Integrated Approach

Field Entry  
Time/Production/Materials

ERP

One  
System

Analytics/  
Reporting

Field Service

## Challenges

It will never have all the features of the single purpose package

# Fully Integrated Approach

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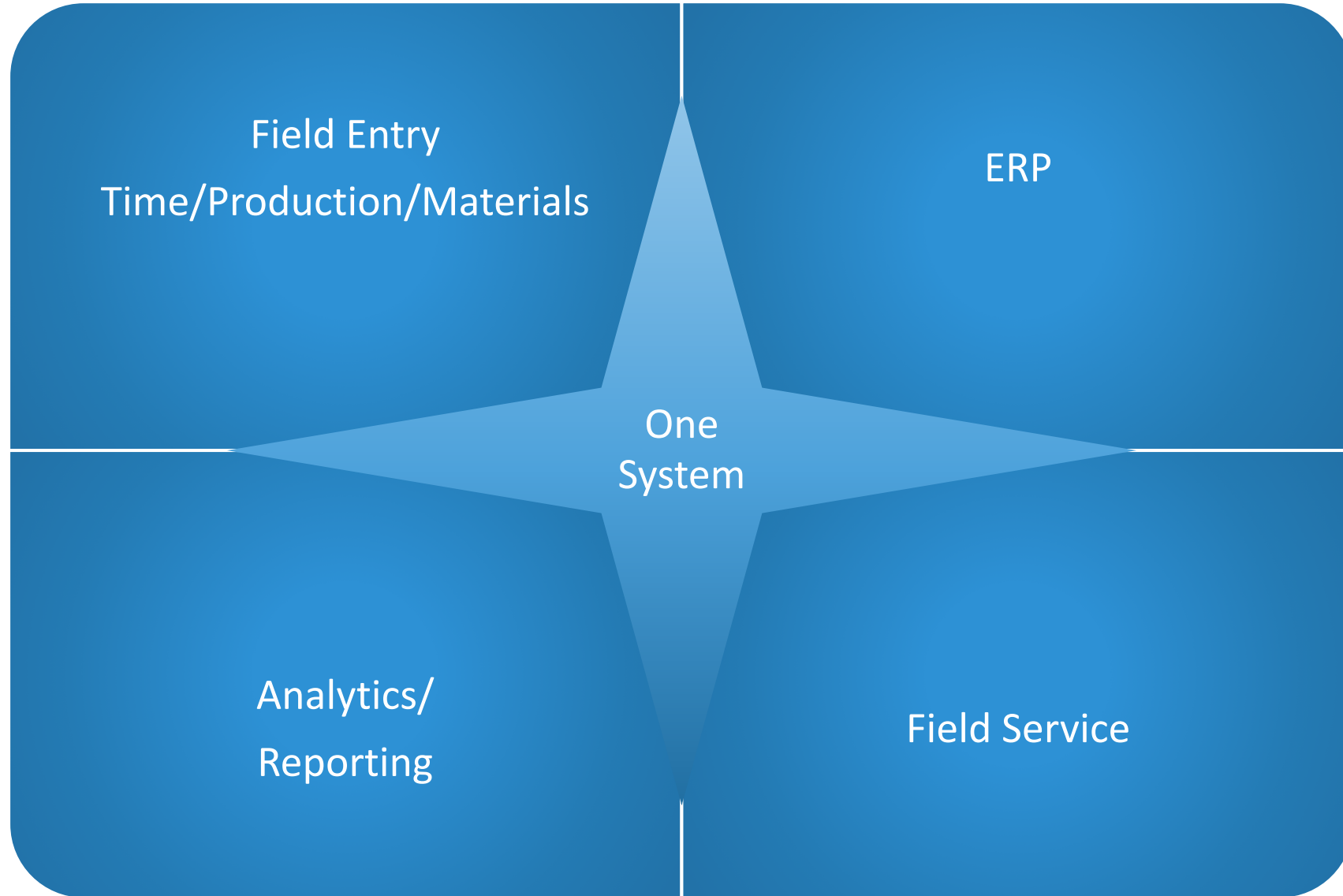
## Challenges

It will never have all the features of the single purpose package

Make sure you can connect with the world



# Fully Integrated Approach



## Challenges

It will never have all the features of the single purpose package

Make sure you can connect with the world

Can you live with that vendor?

# Fully Integrated Approach

Field Entry  
Time/Production/Materials

ERP

One  
System

Analytics/  
Reporting

Field Service

## Challenges

It will never have all the features of the single purpose package

Make sure you can connect with the world

Can you live with that vendor?

Is the product being actively enhanced?

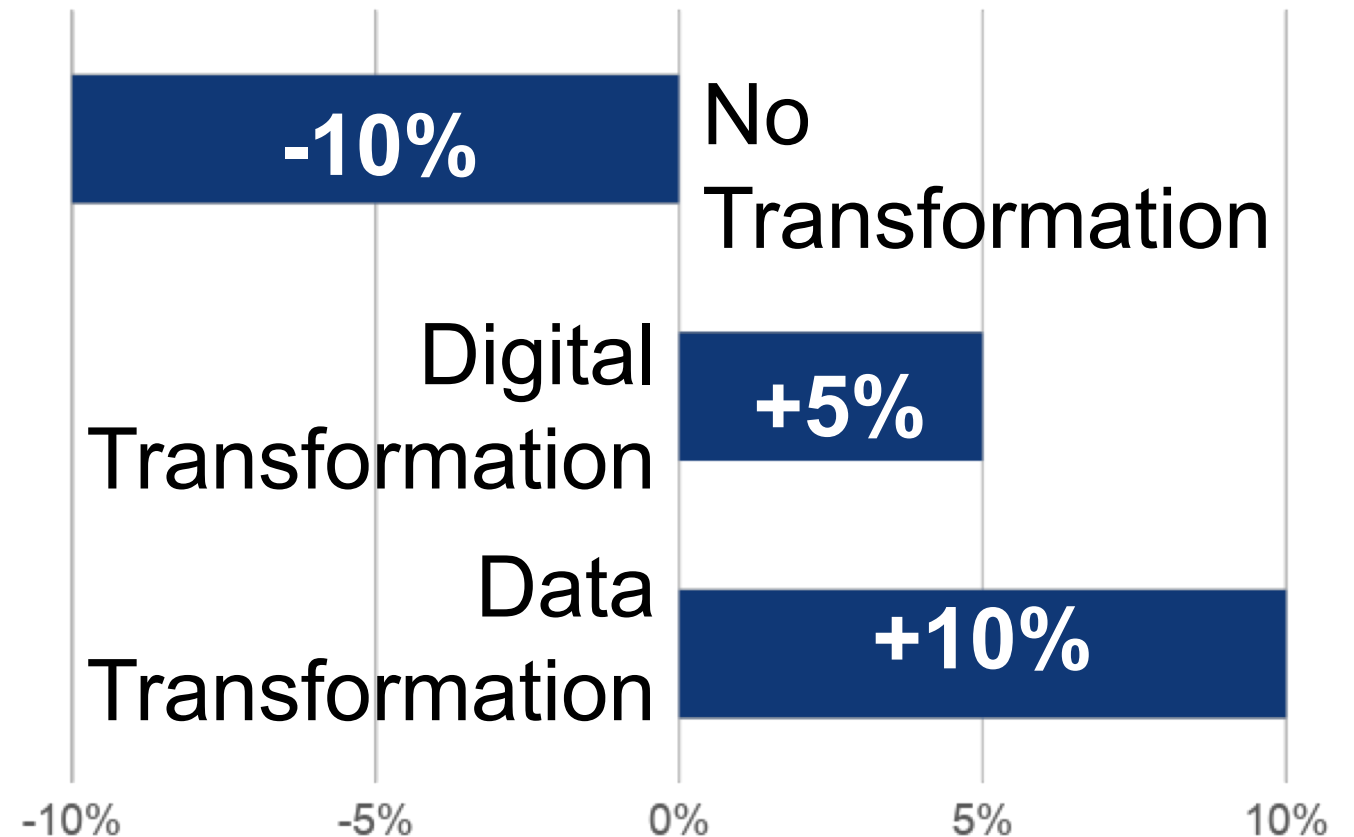
# Data Transformation



## Data Transformation: Why It Matters



### Construction Firm: Relative Profitability



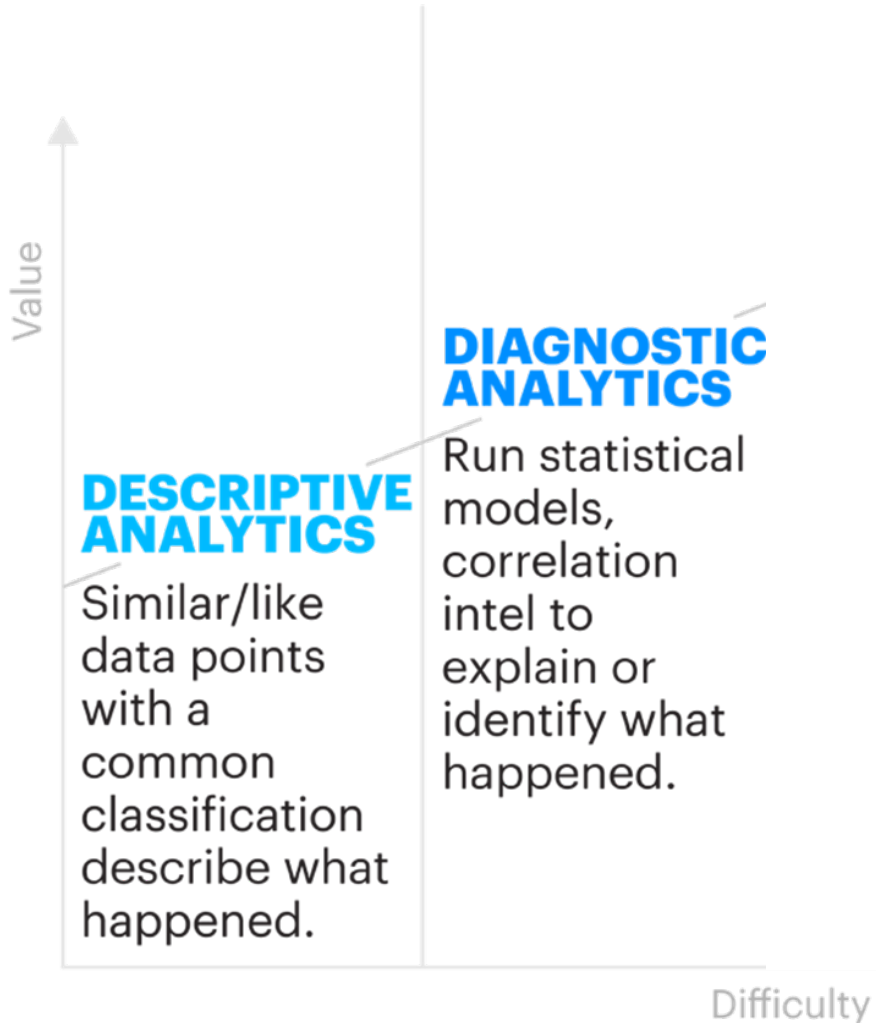
# The Data Continuum



- Number of Work Orders Outstanding
- Work orders not billed
- Profitability per geography

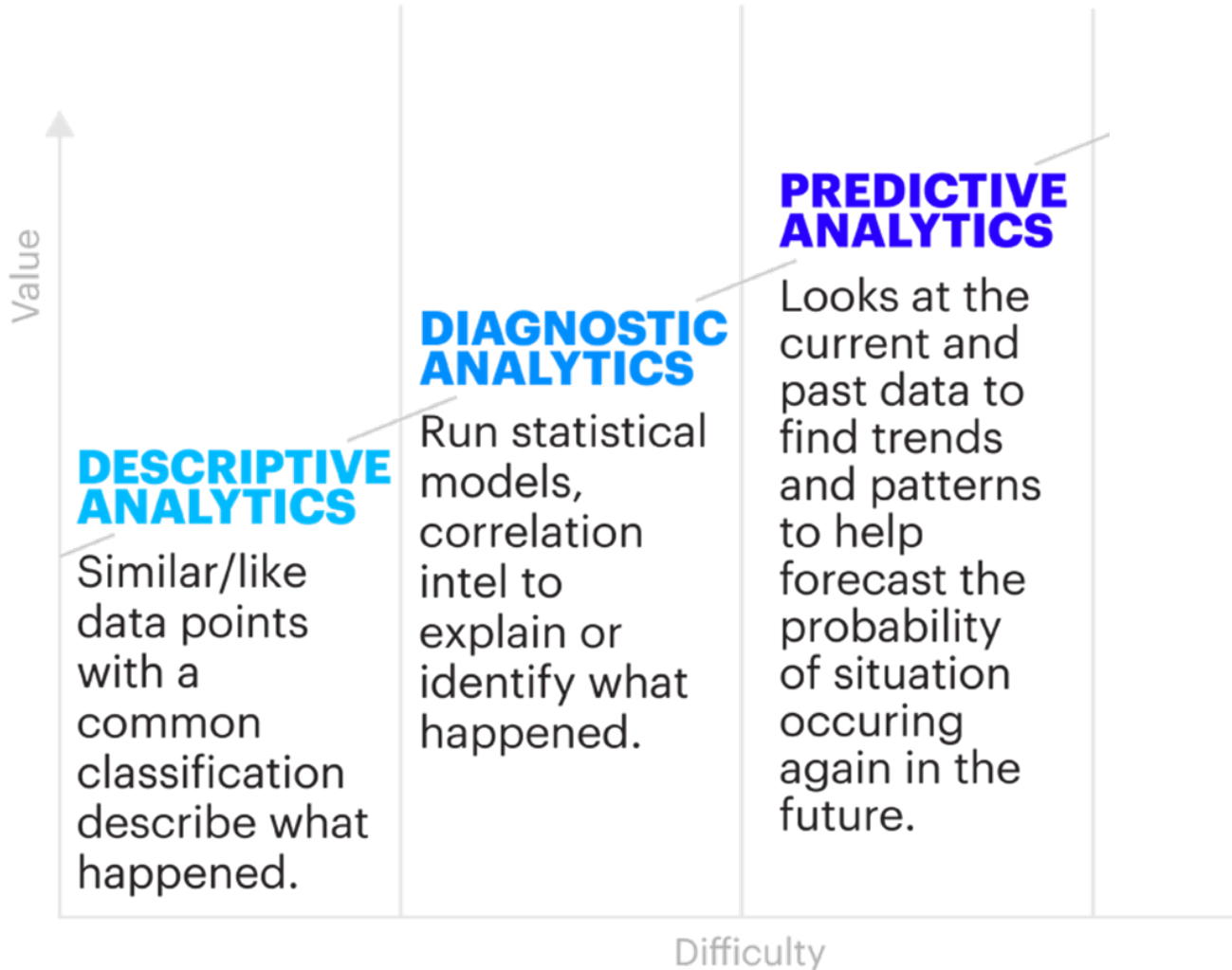
Difficulty

# The Data Continuum



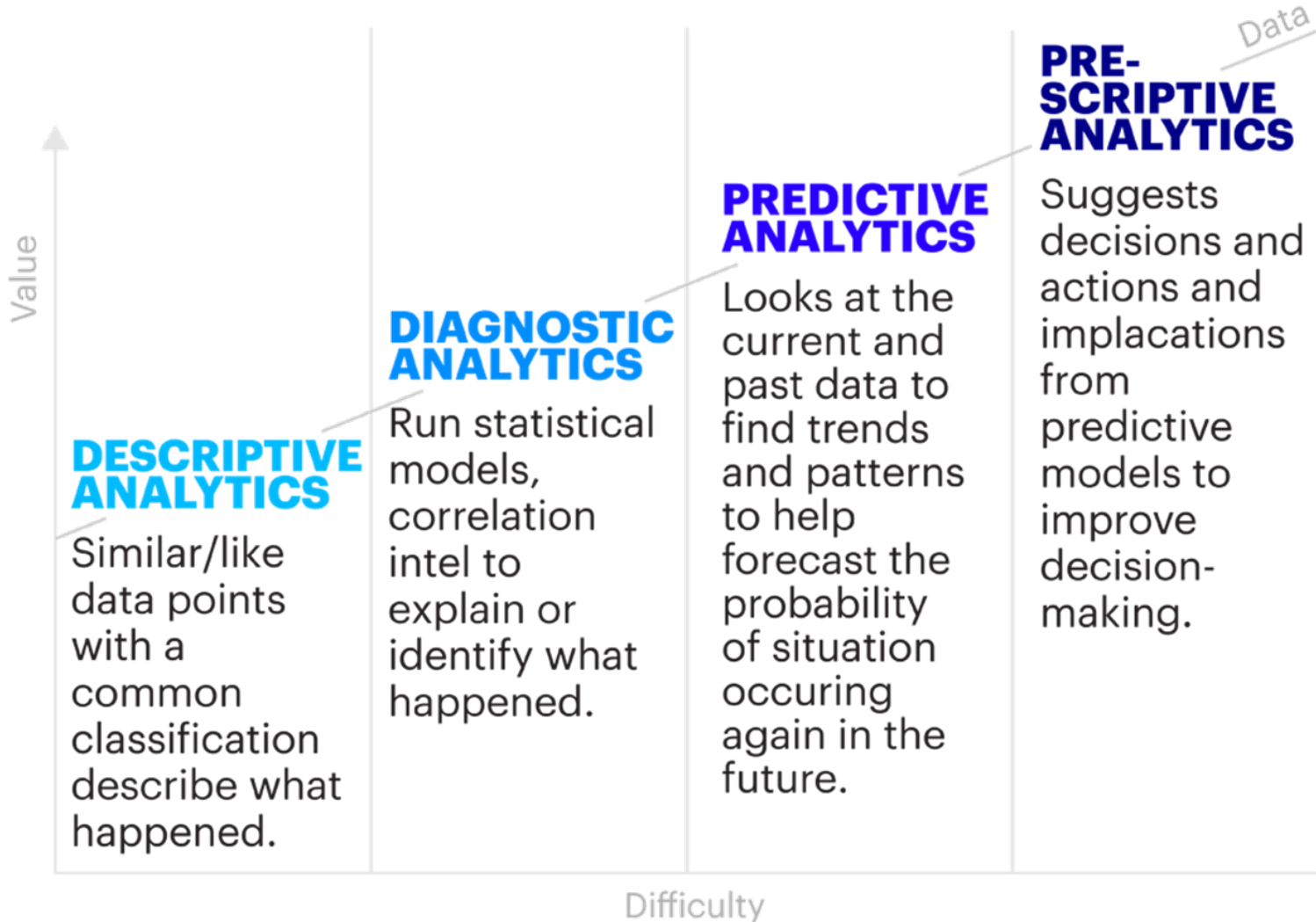
- What factors were responsible for profit fade?
- What were the primary factors resulting in rework?

# The Data Continuum



- Will there be profit fade?
- Are there safety risks on this project?
- Will there be problems with getting materials on time?

# The Data Continuum

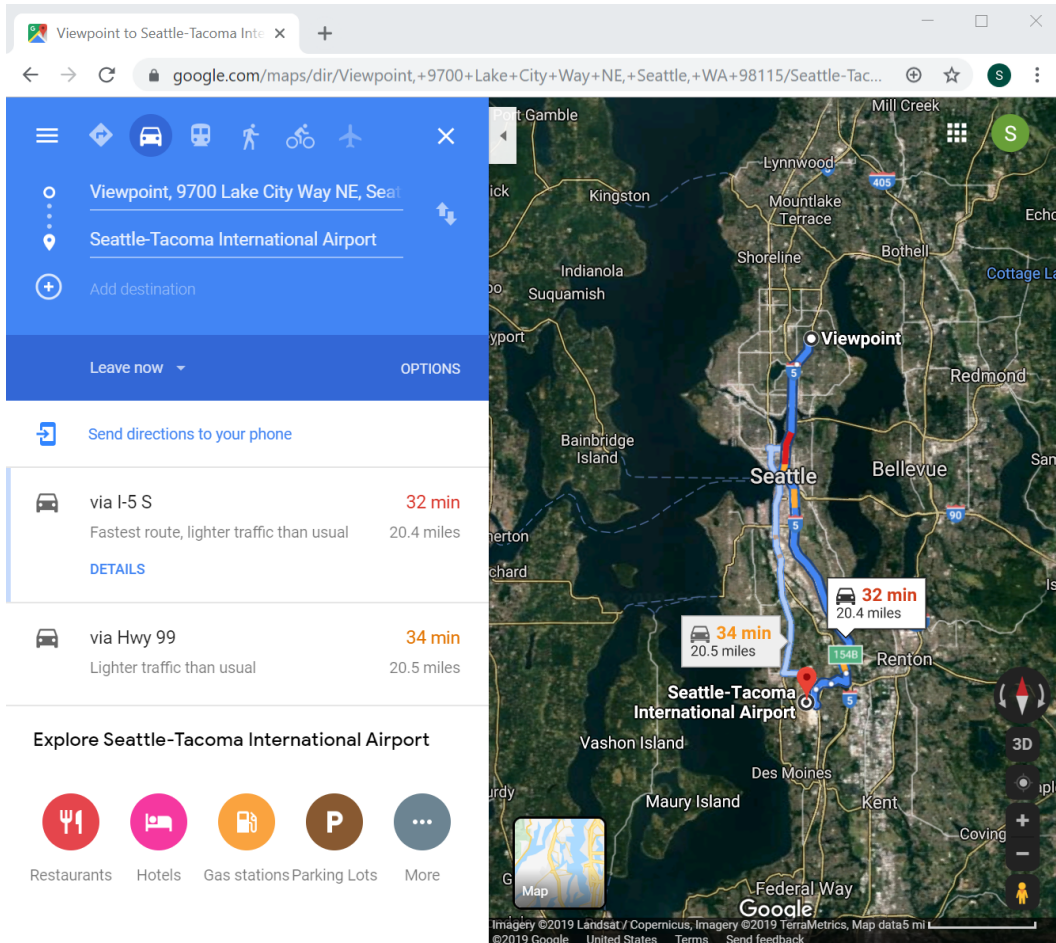


- Order from another supplier who has inventory
- Assign different resource—avoid burnout and employee churn



# My Trip to the Airport

A perfect example of data transformation making my life better



# Your To-Do List

- **Where are you in your digital transformation?**
  - Am I exporting and importing data?
  - Am I rekeying information?
  - Have you adopted a single suite or integrated single-purpose apps?
  - Somewhere in the middle?
- **Where are you in your data transformation?**
  - How valuable are your reports?
  - What kind of questions do you want to ask of your data?
  - Do you have the data to answer those questions?







# Q&A Session

*To submit a question for our presenters, type it into the chat.*

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# Thank you for attending!

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