



Background

Building Consultants, Inc. (BCI) provides construction-related professional services for lenders, investors, attorneys, and property owners. Services include, among others, construction management and review, environmental site assessments, energy auditing, and consulting services. Projects range in scale from \$500,000 church additions to \$85 million mixed-use, new construction and rehabilitation jobs.

Problems

Prior to engaging the Data Tamer, BCI managed its operations with a series of multiple software products, including:

- ACT! to manage contacts (architects, bankers, contractors) associated with projects;
- Microsoft Word to create contracts and reports;
- Microsoft Excel to track project timelines and milestones; and
- QuickBooks to manage invoicing and bookkeeping.

BCI was, and continues to be, a growing business, and its collection of stand-alone software packages was not keeping pace with the growing workload. Although the company relied heavily on Excel, it lacked the ability to manage the many data points that required tracking and relationships among the data. The other software programs simply did not integrate well with each other, and there was significant redundancy in data entry. BCI realized that it needed one comprehensive solution to manage its data and made a few attempts to use Microsoft Access for data management. However, the company did not have the in-house resources to create usable database applications.

Solutions

The Data Tamer first worked with BCI to learn about its current processes and how it applied its office software to those processes. From this discovery phase we outlined a plan for implementing an Access database in stages according to priorities.

We first transferred the ACT! contacts into the new database. Then we moved the Excel tracking data into project information in the database. We could then form a direct link between projects and their associated contacts. We added the ability for the database to generate contracts from data entered via automated Word merging. Previously, BCI created contracts by hand with a Word boilerplate.

BCI has always had its own computer network support, including scheduled backups. However, we felt it prudent to work on a disaster recovery plan specific to the database. We are currently establishing procedures and training for BCI staff to expediently recover all elements of the database in the event of a network server crash or data corruption.

BCI's next step in the staged approach is to purchase Edison's Attic BigTime, a project-management system for professional-services firms. We will continue to work with BCI to provide integration and data flow between the Access database and BigTime system.