

Schirmer Engineering Corporation



Schirmer generates more accurate proposals and reports in less time by switching to integrated Deltek software

"We are now able to track more opportunities and create higher quality firm statements and proposals in less time, which gives our marketing staff much more time for proactive business development activities."

Jim Bychowski, Director of Marketing with Schirmer Engineering

THE CHALLENGE

Schirmer Engineering Corporation faces a larger marketing and project management workload than the typical engineering firm because the company specializes in fire protection engineering, where individual projects tend to be relatively small. The company automated its project accounting, customer relationship management (CRM) and proposal generation processes long ago but found itself entering the same data multiple times in each of the three independent systems. Also, reports such as their current and projected sales reports had to be created manually by drawing information from the three independent systems.

"One of our biggest problems was that each of the software packages that we used was based on a separate and independent database," said Ken Schwartz, Chief Technology Officer for Schirmer. "We had separate records for customers, employees, opportunities and projects in all three databases. Each of these records had to be separately created and updated and in most cases time was short so the accuracy of all the databases suffered."

"The result was that our proposal software contained only a fraction of our historical project information," added Rene Pearson, Corporate Communications Director for Schirmer. "Our regional marketing coordinators could not trust the project database and spent a considerable amount of time emailing around the company to find current project information for their proposals. Project descriptions could not be found so marketing coordinators spent additional time writing them from scratch. They ran into the same problem identifying employee industry and service expertise to match the skill sets required for assembling project teams."

Stats at a glance

Company Name

Schirmer Engineering Corporation

Headquarters

Deerfield, IL

Employees

215

Primary Business

Schirmer Engineering Corporation became the first independent fire protection engineering firm to help insurance companies analyze and minimize risk to life and property.

URL

www.schirmereng.com

The fragmentary nature of the company's previous information systems also created extra work in generating reports. For example the sales report included outstanding proposals, projects lost to a competitor, projects that were cancelled and projects that were sold for each office. Sales data from the project accounting, CRM and individual office proposal logging file systems had to be collected, manually entered into a spreadsheet and then sorted and formulated to create each of Schirmer's 15 regional office sales reports. Upon completion, each office would send their report to Corporate Marketing for consolidation into our consolidated report. All of these reports were created on a monthly basis and took at least one person from each office roughly one business week to complete for a total of approximately 500 man-hours per month.

THE SOLUTION

Bychowski said that the managers agreed several years ago on the need to find an integrated solution to the company's data management needs.

"Deltek had just announced their Vision application suite and since we were existing users of Deltek Advantage for project accounting, we decided to give it a close look," Schwartz said. "We spent a year evaluating the software and it seemed to be a very good fit. The biggest advantage was tying together project accounting with CRM and proposals into a single database. Vision also offers many advantages on the project accounting side such as the ability for employees to enter time and expenses over the web and for managers to obtain reports at any time. The entire suite also offers greater flexibility in terms of being customizable to meet our specific requirements."

THE BENEFITS

Integrating these different functions saves Schirmer considerable amounts of time by streamlining the flow of information within the company. For example, when one of the

company's offices hears about a possible project, they enter the information on the project into the CRM module. When the time comes to produce a proposal, the proposal module picks up the information that was already entered. When the company wins the project, the same information populates the customer record in the project accounting module.

By the same token, the employee information that is entered into the project accounting module forms the basis for the employee qualifications information in the proposal module. The project accounting systems picks up which employees have worked on each project and what their individual roles were on each project. This information becomes immediately available to the proposal generator module.

Likewise, the project description, service type, facility type, industry sector, fees, photographs and all other project information that is maintained in project accounting is also made available to the proposal generator without any additional effort. "It now requires much less time and effort to create proposals and their accuracy and quality has been greatly improved," Pearson said. "In the past, our marketing coordinators spent most of their time hunting for information and writing descriptions that had probably already been written many times in the past but took more time to locate than create from scratch. Now they simply query the database and can quickly identify projects of a particular type and size in any industry. They can also filter through employee names and build resumes for those that meet certain sought after criteria such as professional engineering registration for a particular state or certification in a particular specialty or service area. Additionally, marketers are now confident that employee and project information is consistent and up-to-date. Best of all, records are all hyperlinked together, so with just a few clicks, one can browse from project to employee to client and then another project and so on.

| THE CHALLENGE | THE SOLUTION | THE DELTEK ADVANTAGE |
|---|---|--|
| <p>Schirmer Engineering Corporation needed to find an integrated solution to the company's data management needs.</p> | <p>Schirmer chose Deltek Vision for its ability to tie together project accounting with CRM and proposals in a single database.</p> | <ul style="list-style-type: none"> • Saves Schirmer considerable amounts of time by streamlining the flow of information within the company. • The ability for employees to enter time and expenses over the web, and for managers to obtain reports at any time. • They can simply query the database and can quickly identify projects of a particular type and size in any industry. |

The result is that we are able to create more accurate and client focused proposals in a fraction of the time that was required in the past.”

The time required for reporting has also been substantially reduced. For example, the current and projected sales report can now be generated at any time simply by clicking on a report hyperlink. Reports can be generated real-time, whenever they are needed through a web browser regardless of where the employee is located. At the same time, now employees enter information such as time and expenses directly into the software, eliminating what used to be nearly a full-time job of keyboarding this information. The accounting staff used to have to enter a four-page project information worksheet into the project accounting software at the beginning of a project. However, because data entry responsibilities are now shared by many employees throughout the lead tracking and sales processes, most of the information already exists.

Therefore, a much smaller amount of information is left to be entered by the accounting staff, while at the same time more complete project information has been captured due to the shared responsibilities for data entry.

“By consolidating our major data management functions into a single integrated Deltek environment we have greatly increased the productivity of our people while also improving the accuracy and quality of our proposals and reports,” Bychowski concluded. “Having all our information in a single repository not only saves time but also provides Schirmer with a consistent branding. While we are relatively early in the implementation process, there’s no doubt in my mind that we will continue to see significant economies in the production of our marketing, sales and project information. This system will serve as the back bone of our company as we execute our long term growth strategies.”

Contact Deltek

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Deltek is a global leader dedicated to delivering enterprise management software that meets the unique needs of project-focused organizations. With over two decades of experience, Deltek enables companies to maximize profitability and productivity, integrating all aspects of their businesses. More than 11,000 customers worldwide rely on Deltek to streamline operations, improve performance and win more business.

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