Customer Success Story

Cates Engineering, Ltd.

Design firm reduces risk with Deltek Project Information (PIM) email management

For more than 30 years, Cates Engineering has been serving clients in the Northeast, Mid-Atlantic and beyond. They are dedicated to cost-efficient design, construction friendly drawings, a common-sense approach to structural engineering, and responsive customer service.

But, Cates Engineering was wasting time searching for business-critical emails, impeding their ability to respond as quickly as they’d like. When a project issue or some other matter arose, countless hours were spent gathering historical emails from a variety of sources. They tried to use processes within Microsoft Outlook and Bluebeam, but neither truly met their needs.

They selected Deltek Project Information Management (PIM) to help their business excel and improve client satisfaction. Deltek PIM’s strong email management functionality combined with Deltek ERP integration was a key benefit that influenced their decision to select Deltek PIM.
Cates Engineering, Ltd.

Challenges

• **Exposure to risk.** The process of gathering historical email conversations for project challenges was time consuming and virtually impossible. As a result, the company was exposed to potential unnecessary risks.

• **Inconsistent email accessibility.** Project teams only had access to emails they were copied on, which affected their ability to make informed decisions with current information.

• **Departmental emails stuck in silos.** Even non-project personnel (i.e., HR, marketing, accounting, administration) suffered from emails stuck in individual inboxes, limiting their access to the latest information to make informed decisions or accurately perform tasks.

Solution

• Cates Engineering needed a distinct solution that organized project emails and documents in a single location so critical information was more readily accessible.

• Project teams needed a solution that offered visibility into all project emails, whether or not they were on the distribution list, so they could improve the decisions made during the project’s lifecycle.

• Cates Engineering needed to better unify their corporate departments so they could benefit from access into the latest information to make decisions faster and improve accuracy.

Benefits

• **Save time and mitigate risk.** Emails and documents are now organized in a central repository making it easy to find the information needed more quickly.

• **Make better decisions.** With one source of truth for all project emails, project teams have greater visibility into digital conversations, empowering them to make more informed decisions that improve the quality of their projects.

• **Provide value to non-project personnel.** Cates Engineering now can increase visibility into corporate-wide emails, ensuring that departments benefit from a central email repository – all while implementing security measures to ensure confidentiality from the entire organization.

“I’m fascinated by the way Deltek PIM integrates with our Deltek ERP solution. It is like a one-screen look into a project, but with more functionality.”

– Laurie Schauss, Controller at Cates Engineering