

**COMPANY**

Applied Technical Services

WEBSITE

www.atslab.com

INDUSTRYConsulting Engineering,
Testing and Inspection**COUNTRY**

United States

PROFILE

Applied Technical Services (ATS) is one of the leading testing, inspection and consulting engineering firms in North America with expertise in a variety of industries including automotive, aerospace, nuclear, and pulp and paper, to name a few.

BUSINESS SITUATION

With year-over-year growth of 15-to-20 percent and more than 700 employees dispersed among 28 locations, ATS had no central repository for information storage and exchange, and departments had become siloed in their approaches to document creation and management.

SOLUTION

With SharePoint 2013 and Nintex products, Abel Solutions helped ATS create a more efficient, unified system to achieve document, form and data record standardization across the enterprise, including workflow automation for project, job, prospect and client records.

BENEFITS

Centralization and standardization of data across the enterprise



More effective job tracking and management



Improved access to mission critical records

Achieving Document Consistency and Visibility

Applied Technical Services tames thousands of data points with SharePoint 2013 and Nintex Workflows

Founded in 1967, Applied Technical Services (ATS) is one of the leading testing, inspection and consulting engineering firms in North America. Its corporate headquarters are in Marietta, GA, with 28 satellite offices predominately in the South and Northeast. Some 700 employees support the firm's expert services in a variety of industries including automotive, aerospace, nuclear, and pulp and paper, to name a few.

With year-over-year growth of 15-to-20 percent and thousands of active projects, ATS' information management approach no longer served its needs. Information storage had become fractured and inconsistent among departments, and the lack of clear, consistent process and data workflows were impeding operating efficiency. The firm also wanted to overhaul its legacy internal portal, building a home page for each department with document storage centralized within the system, and to create a customer portal, as well.

“ If you've got a process that you need to follow, it's much better to automate it and what better way to do it than to use a Workflow process.

– Michael Murray, IT Director, Applied Technical Services

To find a better, more intuitive and automated solution, ATS IT Director Mike Murray worked with Abel Solutions to create a centralized repository, using SharePoint 2013 with Nintex Workflows and Nintex Forms, for project, job, employee, and even prospect and client information. Nintex Workflows and Nintex Forms have played a pivotal role in achieving one of the organization's biggest successes—dozens of automated workflows, with system triggers for new workflow creation based upon predefined events. In the process, ATS has transitioned to a robust document creation, editing, and management system where workflows dramatically increase consistency of data storage and access to information.

ONE-STOP SHOP

Some of ATS' specific data-related requests included:

- A centralized, searchable, and filterable repository for job-related documents – from specifications and test reports to work order forms, so employees have access to task-critical information.
- Automated workflows to create and track new records, such as project records and work orders, which are tied to the clients, prospects, jobs and other system elements that relate to them. Currently in development or planned are additional workflows that generate and track job quotes, purchase orders and more.
- Automation of “processes within processes,” such as having the system notify an employee when a new project or job is created and assigned to him or her.
- Workflow-based data management that ties all relevant materials, from engineering to testing and inspections, to its relevant project based on a unique Project ID.

ENHANCED CUSTOMER AND PROSPECT MANAGEMENT

One of the major pieces of the puzzle for Murray was customer relationship management (CRM). In the past, potential clients were captured by a receptionist and stored in a homegrown CRM system using SQL and Microsoft Access. At the end of the day, the receptionist would release the list of prospects to various employees for follow up, but there was no formal notification process.

Using SharePoint and Nintex products, Abel Solutions helped Murray create a purpose-built CRM system. When incoming call information is entered into the new system, it generates the record and sends an alert to the employee designated for follow up with the customer. The follow-up person can quickly and easily edit the record to add more data, and workflows help generate additional, related records as the prospect is converted to a customer or a new project is launched once a deal is closed. This solution has allowed ATS to gather, qualify and pursue more leads without the need to grow its staff.

UNIFIED PROJECT VISIBILITY AND MANAGEMENT

Equally valuable, Murray notes, has been how the Nintex workflows are tying everything together for the benefit of better project and equipment management. **“We do testing, inspections, and engineering, but our final product is a report,”** says Murray. **“We are currently building workflows that will automate document generation through a templated process. A worker will go to a folder, choose a template, and copy it to the project or job folder. The new document will inherit the metadata from the folder – name, purchase order number, and other information. It saves time and improves accuracy.”**

THE SKY IS THE LIMIT

Murray says the company is currently in the process of rolling out the system to all departments, and in the interim, his vision has grown exponentially. From an initial expectation of only a few Nintex Workflows on top of SharePoint, Murray's vision has grown to at least 100 Nintex Workflows. This includes a workflow to track fixed assets, including those that need to be calibrated for accuracy, and another workflow for detailed parts searches. **“We wanted to be able to search for a specific part number, and the system looks through all these documents,”** Murray says. **“The ability to do that is very powerful.”**

He is equally excited about his custom-built CRM, and foresees more workflows helping enrich customer service by reminding staff to check in with them. **“Having a workflow that runs in the background that says, ‘Hey, you haven't done work for this client in 90 days,’ and sends out a system-generated email to alert responsible staff, will be very valuable in the long run,”** says Murray.

Regarding user adoption, Murray says, **“Like any implementation, there are going to be problems, because there is change, but employees wanted this consistency of data. They are giving us suggestions to improve the user experience, and they are really appreciating the benefits of this system, overall.”**

“That's one thing I've determined is there's really no limit to the amount of things that you can turn into a workflow.”

– Michael Murray, IT Director, Applied Technical Services