d-tools
System Integration Software

Security Integrator's Guide to Improved Operational Efficiency

For
Estimation & Budgeting

For
Engineering

For
Project Management

Increase Revenue and Improve Operational Efficiency Through a Data-Driven Process

The typical project for security system integrators contains a combination of several technologies, bringing together audio/video, surveillance cameras, access control, alarm systems, and networking when designing CCTV, Intrusion and Access Control, Fire and Safety Alarm, and IP systems for both residential and commercial environments. Security system integrators need to understand how these diverse technologies can work together to create a cohesive, easy-to-use system for them and their clients.

In this article, we'll explore three different areas of the security systems integration process where you may face potential pitfalls, and how implementing a solid, data-driven software solution such as D-Tools System Integrator (SI) can help overcome them. Estimation and Budgeting, System Design, and Project Management —all crucial to the systems integration process—are often managed separately or not at all. However, when these project phases are managed with a software application and dynamically linked together by product data, the benefits become immediately apparent for your company. D-Tools enables you to utilize up-to-date and detailed product information, in a format that can be utilized in a cross-functional capacity for maximum workflow efficiency.

D-Tools Software Solution Overview

More than 5,500 companies around the world have made D-Tools SI the most widely used estimation and budgeting, design, and project management software platform. Our solution ties these elements together into a singular, data-driven, connected process that reduces time, helps eliminate errors, and ultimately produces bottom line results. Featuring third party integrations and access to a comprehensive library of manufacturers' products, this solution positively effects – and thereby improves – all areas of a system integrator's business.

D-Tools' data-driven solution improves on all areas of your business:

• Estimation and Budgeting:

Generate fast, accurate, detailed documentation ensuring accurate, equipment needs and labor time.

• Engineering:

Generate stunning system designs via integrated Visio or AutoCAD for clear communication across all trades.

• Project Management:

Communicate with your team from any device to deliver the job on-time and to-budget.
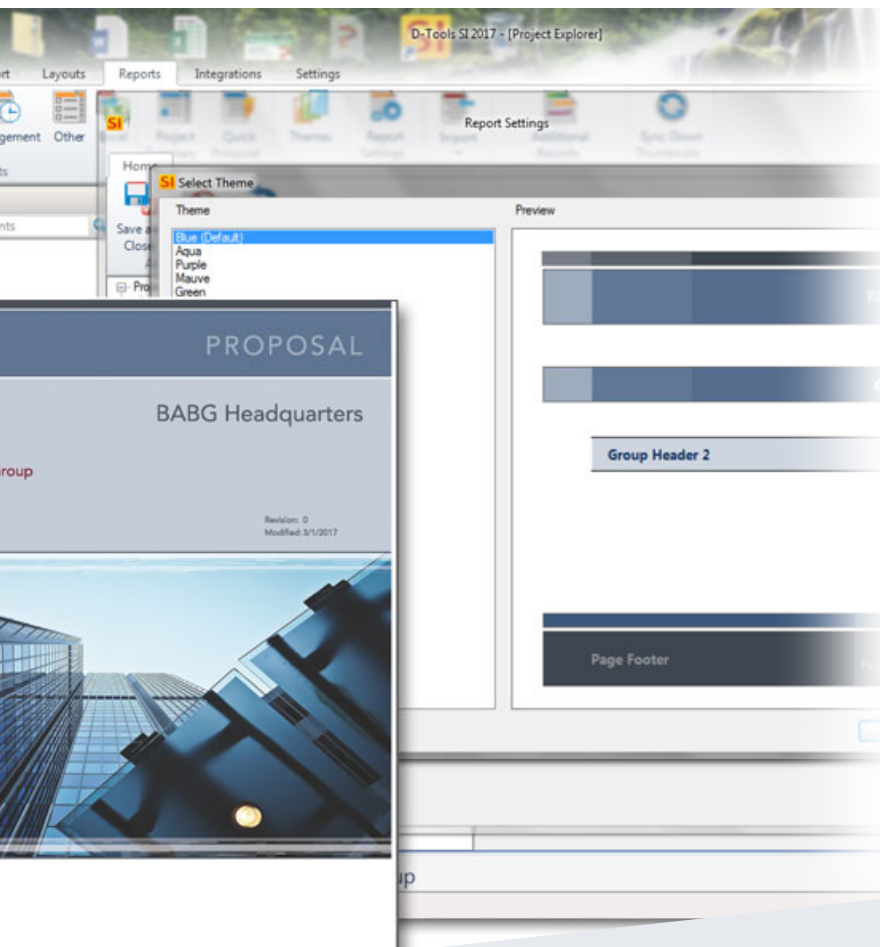
ESTIMATION AND BUDGETING

Estimation and budgeting can be difficult and extremely time consuming as it can often be challenging to find essential products for a given project. When each proposal consists of repetitive tasks, such as copying and pasting, as well as locating necessary products, it can lead to overlooked equipment and underestimated labor time. Without proper project estimation, proposals can appear unprofessional and incomplete to the client, potentially resulting in loss of business, which directly affects company revenue.

It can also be difficult to accurately determine profitability per project. Allocated time per project phase can be under-estimated and common project materials can be overlooked, potentially resulting in an overall lower bottom-line.

Implementing a systems integration software solution such as D-Tools SI can help with the creation of fast, accurate proposals and enable projects to be completed on-time and to-budget. All pricing and product data is driven from a constantly updated database—where all the information is readily accessible. You can dramatically reduce the time it takes to research products for proposals, which in turn provides your team the ability to react to requests more quickly thereby ensuring the best chance to win bids and complete additional projects. D-Tools also gives you the advantage to win more projects with the competitive advantage of professional-looking and detailed quotes customizable to your look and feel.

"Thanks to D-Tools, we can now quickly and easily build needed documents as we create proposals. SI has reduced the time it takes to generate proposals and has also increased our accuracy. I could never imagine returning to our previous method for generating proposals. With SI, managing and searching for products is easy and the process is far more flexible. We have a default SOW template that can be customized and inserted exactly where we want it in every proposal to prevent redundancies."
– R.J. Spurr, Access Technologies

SYSTEM DESIGN ———

System design is the most straightforward way to communicate the parameters of the project to the client, in-house team members, subcontractors, and other trades. Concise designs provide a guide for the project installers and team members or subcontractors to follow, ensuring accurate and efficient project execution. Unfortunately, some security systems design and installation companies lack the in-house engineering resources to complete system design, and so they either skip this phase or assign it to another firm. Subcontracting this important work can be costly, while foregoing system design, altogether, can ruin a project before it begins.

> **"** *We use D-Tools for everything from pricing, to ordering, scheduling, invoicing and accepting payments, and for all our CAD design. The D-Tools platform has helped us streamline and improve our sales and design processes by 80 percent, resulting in timely installs 100 percent of the time, and increased customer happiness. It's difficult to put a price on that, other than to say it has resulted in more customer referrals for increased profits and growth. This is the platform we use for every project now.* **"**
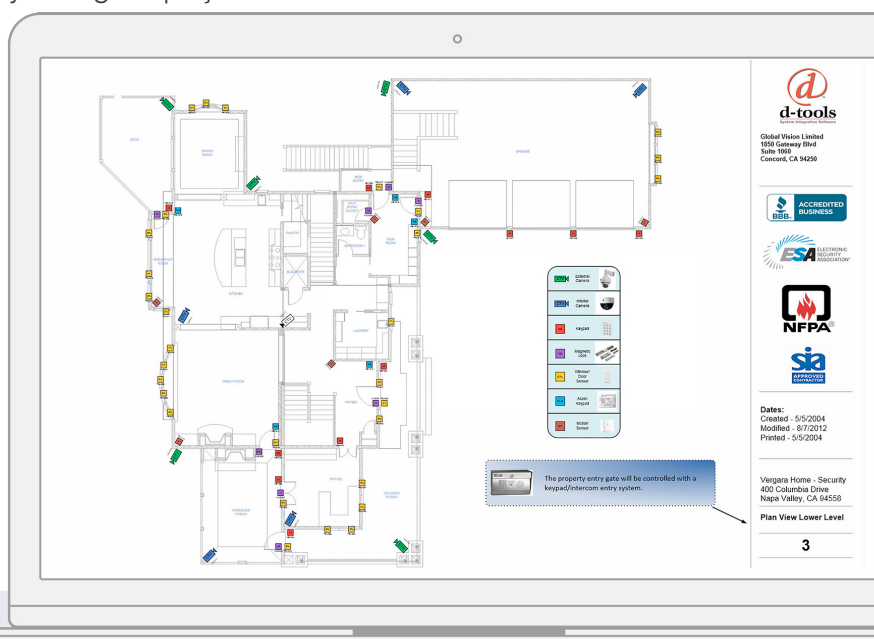> *- Ben Thompson, HomeSmart Fire & Security*

If you include a project design in the proposal, you'll clearly communicate to internal and external team members with your attention to detail, improve the readability and aesthetic of every proposal, and help clients visualize the results of the completed project. Detailed and accurate system designs can be the differentiator that solidifies the accuracy and speed of the project's completion. D-Tools simplifies the process by reducing the time and work required to create designs. Improving efficiencies during the design phase will result in reduced errors and assurance that budgetary expectations are met for the client.

One way to do this is by including accurate and detailed data within the initial estimate, and using D-Tools to automatically integrate that data into the designs. D-Tools gives you the ability to eliminate the time-consuming documentation that often follows system design. The project can be started directly in Visio or AutoCAD—designers build desired drawings and layouts, and D-Tools produces all the documentation from budgetary proposals, equipment lists, and wire schedules to wire labels. You will no longer waste time with manual documentation that must be updated continuously during the project.

> **"** *The ability to add materials and drag them right over onto a Visio line drawing is amazing. We use the line drawings to help clients understand how a system is designed on the front end, and it's a great quality-control tool for us. I cringe just thinking about how much extra time this took back in the old days. The accuracy in proposals and subsequently a project is off the charts compared to what it used to be without D-Tools.* **"**
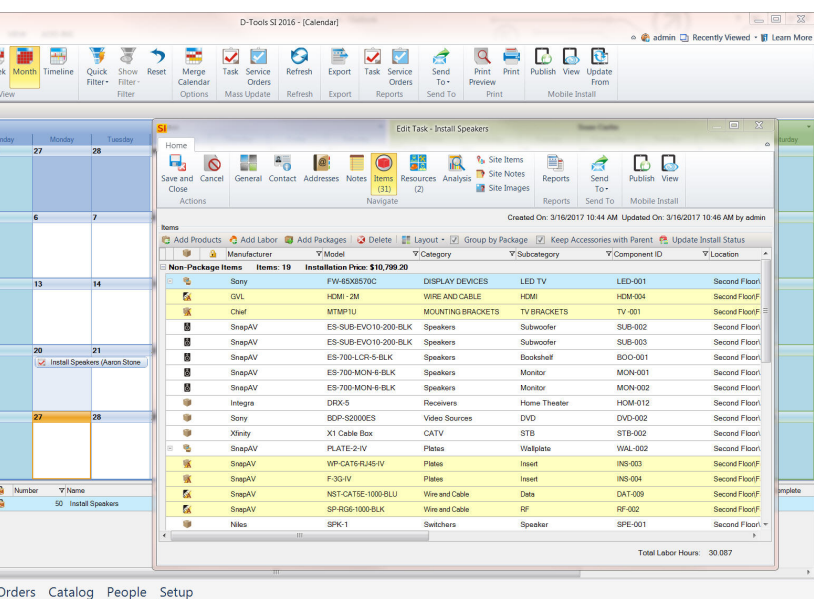> *– Kevin Crow, Excel AV Group*

PROJECT MANAGEMENT ———

Project management is quite possibly the most important aspect of a security project because it's the framework that helps determine the overall success. Unfortunately, due to disorganization, it is often implemented improperly, which results in inaccurate time and cost tracking that can waste valuable resources, which could be used to complete projects as according to plan. Utilizing D-Tools' project scheduling, resource management, and powerful reporting capabilities can help ensure that the job is delivered on time and to-budget, with profitability in mind.

SI facilitates project management by improving communication between not only you and the client, but also with internal team members and external contractors. SI makes it easy to assign tasks to internal installation and programming teams, schedule those tasks in a master project calendar, then communicate those tasks via email, task, or via the cloud-based Mobile Install feature.

SI allows you to track labor tasks, installations, and resource scheduling by generating a project work order. SI also provides functionality for creating and managing Service Orders for projects. Consistent use and tracking of work orders, used in conjunction with SI's new online project scheduling and resource management tools, helps improve product-based labor estimates' accuracy over time.

D-Tools also has the capability to report critical project and product information across multiple projects. This will allow you to provide your team with a powerful Business Intelligence engine to drive visual reports and dashboards of key performance indicators. In addition, D-Tools makes it easy to create custom visual reports and dashboards to understand important elements of business activity such as sales activity, personnel performance assessment, vendor engagement, product usage, profit analysis and more.

"*With D-Tools, we now have an efficient and accurate internal communications system that clearly defines and tracks the status of all products for every project. We are now tracking change orders more accurately and are getting sign-off for them prior to work commencing, as is required by many of our builder- and architect managed projects. We now also have more comprehensive communications tools at our disposal when working with clients and project stakeholders. Thanks to D-Tools, we have more time to focus on the development and growth of our business.*"
– Kassa Harrison, Harrison Home Systems

"*Because we are able to define users and assign roles relevant to their position, our processes have improved. We've become more efficient because everyone can access the information they require during any stage of the project. D-Tools SI is the only solution we know of that has the capabilities we were looking for. It consistently helps me find a way to accomplish what I want, so Access Technologies can continue to push the envelope and blaze new paths.*"
– R.J. Spurr, Access Technologies

SUMMARY:

Accurate product data is the link between the estimation, system design and project management phases, and provides system integrators with a synchronized process to manage project elements including equipment, labor, and time management. By utilizing the comprehensive capabilities that D-Tools offers, thereby linking each phase cohesively, overall satisfaction is heightened. With better project management, it is far easier to address system adjustments and react to potential issues before they become major problems resulting in reduced errors and increased overall profitability.

Implementing D-Tools will create a streamlined business process that promotes organization by assisting with the initial estimation phase, a method to create clean and concise designs, and a firm basis for project management for increased operational efficiency.

> **Quite simply, no other platform allows integration of the entire business process, enabling companies to increase revenue, improve efficiencies, and increase overall client and company satisfaction per project.**

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