d-tools

System Integration Software

AV System Integrator's Guide to Increased Revenue & 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 system integrators contains a combination of several technologies, bringing together audio/video, automation, lighting, access control, telecommunication, and networking into various environments including residential and commercial settings. 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 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:

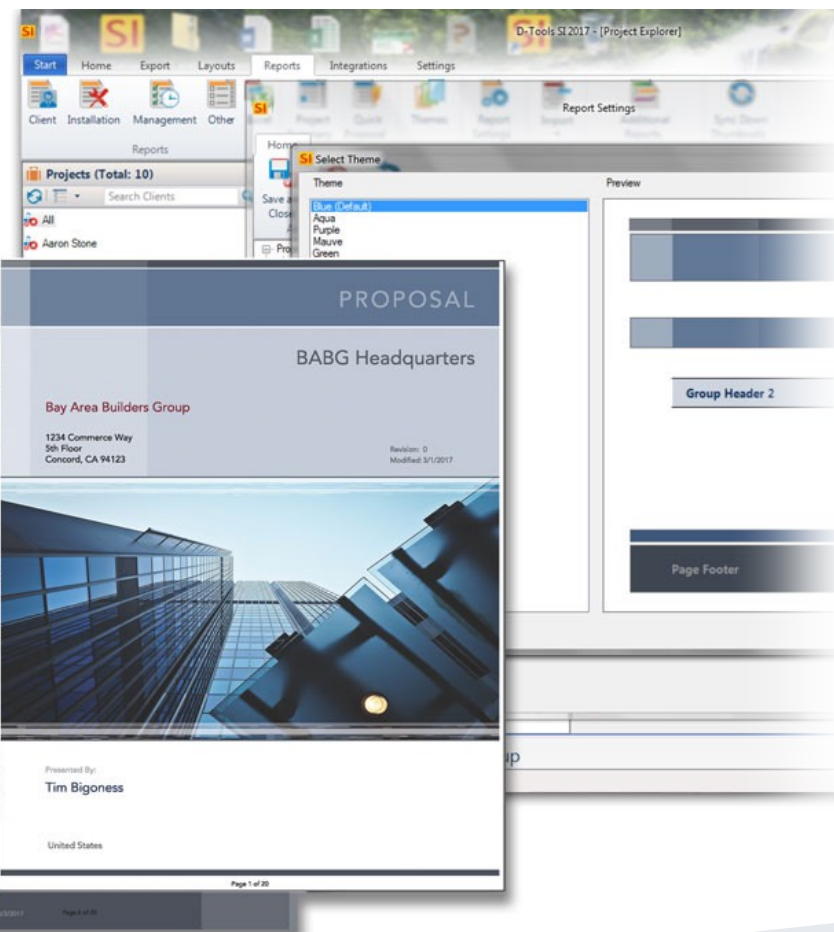Communicate with your team from any device to deliver the job on-time and to-budget.

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.

"Through the use of D-Tools, we have been satisfied with the continued compliments received from clients on the quality of proposals and by organizing the project in ways that they can easily understand. By knowing how the client's organization does business, we can cater reports and terms to meet their accounting and processing needs. With its combined feature set, D-Tools provides a win for us as well as our clients."
– Chet Neal, Sound Stage

D-Tools Customer Portal for Client Approvals and E-signatures from any Web-Enabled Device

Another key to successfully winning a bid is consistent client engagement right from the start. To ensure more interactive communications with clients, the D-Tools Customer Portal enables you to publish Proposals, Contracts, Change Orders, and other client-facing documentation to the web any time, and from anywhere. Your clients will be able to log-in to a secure web portal and review documentation, make comments, and accept or reject critical business documentation.

In addition, you will be notified when a customer reviews, comments or accepts proposals, streamlining the process and improving communications throughout the project lifecycle.

> " Before we started to use D-Tools we didn't have a process that everyone used, from the initial contact on a project right through to the installation and final sign-off. From the start, the D-Tools Customer Portal enables us to push change reports directly out to the client for immediate approval. D-Tools then allowed us to work on multiple areas at the same time to ensure there were no delays and that the job ran smoothly from concept to final delivery."
> **- Simon Johnston, Saville Audio Visual**

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 system integration 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.

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.

> "*D-Tools' design offerings make SI crucial to our business as a one-stop shop. Every integrator knows that documentation is all about communication. SI's data-driven process allows for efficient communication with our customers and engineers, and we can now easily tie in all necessary data within products for our designs.*"
> **– Christian Broendbo, Atea**

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.*"
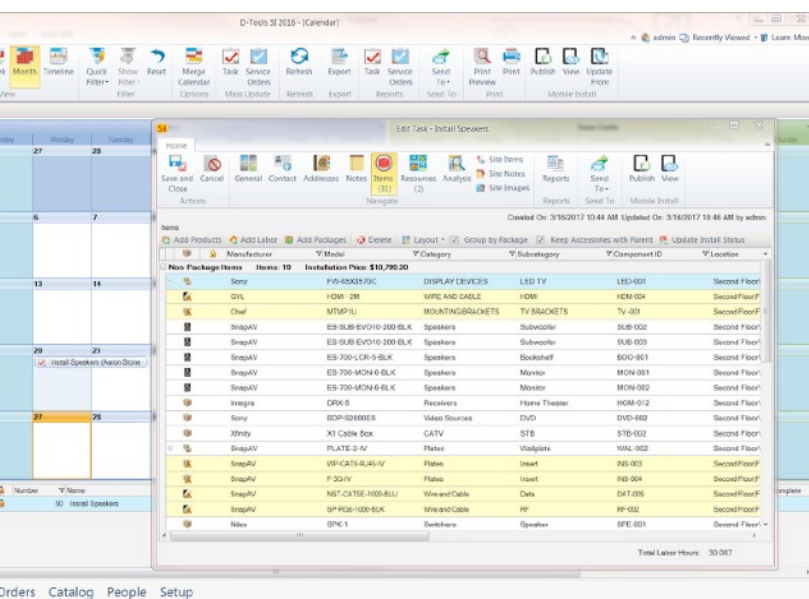> **– Kevin Crow, Excel AV Group**

PROJECT MANAGEMENT ───

Project management is quite possibly the most important aspect of a system integration 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.

"*D-Tools helped us map out the process and signal flow, so that when we're on-site working with the general contractors, electrician, and IT staff, we can be proactive instead of reactive. We want everyone on the same page—from engineers, to installer, to programmer—so it's a smooth workflow throughout the process. D-Tools is helping us build efficiencies, and that's the most important part.*"
– Trent Fettig, Tierney Brothers

"*Whether it's a quote, a pick-list, a design, or project management, D-Tools is the backbone of everything we do. D-Tools has improved our design processes, our scheduling, our time management, and our ordering processes. We use D-Tools for all our projects now because we think it is the best tool for proposals, documentation, and system design.*"
- Barry Barrientos, Millennium Systems Design

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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visit www.d-tools.com