6 Ways to Work Smarter in the Field

How Quick Base Simplifies Project Management and EH&S Incident Tracking
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Introduction

How much time and money do you and your teams waste every day trying to get the right people and equipment to the right locations across all your customer sites? How long does it take to manage RFI submittals, bidding, or estimates, or evaluate key metrics on job performance and other parameters across multiple data sources? And, how often are customers frustrated because you can’t quickly adapt to their changing needs?

Today, nearly every type of organization has people working in the field who need to be clear on project goals, budgets, deadline, tasks, materials required, and more. If you are one of the many still relying on spreadsheets, emails, phone calls, or rigid point solutions to manage projects in the field, you’re all too aware of the productivity drain, human errors, and communication challenges they pose—and the impact that has on service, budgets, and timely delivery.

For those responsible for Environmental, Health, and Safety (EH&S) incident tracking you too know how tough it can be to carry out this critical and often complex work with office spreadsheets, paper forms on job sites, or off-the-shelf tools that can’t be customized to the way your team works best. And without the ability to report on, monitor, and act on EH&S incidents in real time, or ensure the right training and certifications are in place, you risk the safety and well-being of your field team, your customers, and the environment. Lack of visibility and timely response to potential hazards can also drive costs through the roof.
What if you could modernize project management and EH&S tracking and enable your office and field teams to seamlessly share information and insights on any device, from anywhere, at any time? It’s now easier than ever with a new class of application building platforms that enable you to create your own custom solutions without having to be a software developer.

That’s exactly what the following five Field Services “Quick Win” solutions exemplify. Each one provides a different perspective on how the Quick Base platform was leveraged to simplify and optimize the way work gets done using applications built for and by the business.

With a visual and intuitive interface, Quick Base not only simplifies the creation of custom applications but also makes them easy to use by incorporating a familiar look and feel that mirrors everything from commonly used terminology to recognizable steps in an existing process. And they’re powerful—capable of automating manual tasks; digitizing and speeding access to information and documents to the right people at the right time with alerts and notifications; and literally making every workday in the office or field easier and more productive.

Ready to find out what they’ve accomplished with Quick Base, as well as their tips and advice to help you and your team benefit from your own Quick Win? Read on.
Field Services:
Project Management
Quick Win #1: Boyett Construction

“Quick Base takes the effort out of collaboration, and timely information flows freely. That’s been a big incentive for adoption. It’s just the opposite of what you typically hear when you’re implementing new systems within an organization.”

- Vern Boyett, Owner and CEO, Boyett Construction

Boyett Construction Boosts Efficiency and Scales Rapidly

“Boyett Construction is a busy sub-contracting firm that handles about 150 commercial construction projects a year in the San Francisco area. Previously, our projects were managed with spreadsheets, emails, texts, and lots of in-person conversations across offices, warehouses, and job sites. It wasn’t the most efficient way to work and information wasn’t always up-to-date. With so many moving parts to coordinate, and little room for error, the only way to ensure quality and timeliness was to limit the number of projects we could take on at once.

To support business growth, we needed a way to standardize everything and put the latest information at our staff’s fingertips.”

👍 Business Impact: By building a customized and comprehensive Quick Base app called “BMS”, the firm can now handle a 50% higher project load across every role—from division and project managers to superintendents and foremen in the field. The app is designed to help orchestrate every part of every job with perfect timing—from estimates and materials ordering, to precise field and project management, to rapid problem resolution. In a world where delays can trigger fines of $200,000 per day, that kind of capability has bottom-line impact.

💡 Vern Boyett’s Advice: “One of the big advantages I saw with Quick Base was that we didn’t have to tackle building a battleship all at once. The platform gave us an effective and cost-efficient way to build and integrate solutions one role at a time.”
Quick Win #2: DetailMGR

DetailMGR Improves Visibility and Workforce Accountability

“We have a real-time view of our activities at every location. This [Quick Base] app has led to improved customer service, faster delivery of customer vehicles, better reporting and metrics, and an improved bottom line.”

- Kent Hendricks, CEO, DetailMGR

“DetailMGR provides car washing and detailing services to auto dealerships, and our proven track record for delivering high-quality service with maximum efficiency has helped us grow fast. When the business began though, we didn’t have a lot of visibility into the auto detailing process. Information about each car serviced, how long it took, which employees worked on it, the chemicals used, and all the different dealership requirements were difficult to track. That made it hard to make decisions to improve operational efficiency or report on the quality and value of the service provided.”

👍 Business Impact: With development assistance from Quick Base Solution Provider (QSP), Trinity Integrated Solutions, employees now begin service by opening their Quick Base mobile app and scanning the VIN number of the car. Once service is complete, they can print a receipt from a small device they wear and leave the slip in the car.

This integrated solution helps employees move more cars through the process and enables them to quickly log information about each job. The result is a 25% improvement in overall turnaround time and a 10% reduction in labor and chemical costs. Fast, in-depth reporting capabilities provide greater visibility that can also be shared with dealerships.

💡 Kent Hendrick’s Advice: “If you need a fast and cost-effective way to build in more complex functionality, consider engaging a QSP. Trinity’s expertise helped us take our Quick Base solution to the next level with a custom mobile app that has built-in barcode scanning and VIN decoding, and is integrated with a Bluetooth-enabled wireless printing system.”
Quick Win #3:  
**Rexel IPG**

“**Rexel IPG Improves Bidding and Project Execution**

“Rexel International Products Group is among the top three global players in the electrical distribution industry. I lead a small team that supports pricing and coordinated delivery of electrical products for some of our biggest and most complex construction projects—such as a new hospital, factory, or power plant. These engagements represent investments of $250 million or more and take from 18 to 36 months to complete.

Good collaboration with buyers, engineers, materials managers, and electricians is vital for keeping these large builds on time and on budget. Our challenge was that emails and phone calls were not very efficient or effective—especially when communicating with people across different time zones and countries, which was often the case.”

**Business Impact:** Custom project management apps can be easily built by the team on their online Quick Base platform. Project portals keep all stakeholders informed no matter where they work or what device they use. The ability to incorporate familiar terminology and create personalized, role-based dashboards speed app adoption and allow for secure, instant information access. Automated alerts and notifications drive consistent project delivery and greater awareness with less time/effort. Integration with “Box” provides a secure online document repository for everything from purchase orders to component specs.

**Steve List’s Advice:** “Create an app, play with it, and then put it into production but keep the copy back. You want to maintain that production in a sandbox environment, so you have a clean copy to use, otherwise it becomes hard to maintain. Also, from a project management perspective, be clear about the problem you want to solve and articulate what you are trying to do first before you attempt to build.”

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“Our first [Quick Base] app enabled us to contribute to the successful construction of a $20 billion-dollar power chemical complex. It became the foundation for the template we now clone and customize for each customer.”

- Steve List, Bid and Execution Center Leader, Rexel IPG
Field Services: Environment, Health & Safety Incident Tracking
Quick Win #4: Sturgeon Electric

“I really liked that we could create a user-friendly app that would instantly put actionable information into our field teams’ hands to support fast decisions and quality outcomes."

- Jesse Guardado, Project Manager, Sturgeon Electric California

Sturgeon Electric Keeps Crews Safe and Efficient

“Sturgeon Electric California is a high voltage electrical contractor for Southern California Edison. I’m a project manager for Sturgeon Electric Company [a subsidiary of MYR Group Inc.], and my team and I were asked to set up shop for the new location in California three years ago. We’ve got 16 crews out there doing everything from handling outages, to installing power lines and underground electric, to restoring power to fire ravaged areas. We wanted to make their jobs easier, safer, and more productive by automating manual processes and providing fast access to the latest information in and outside the office.

Quick Base has helped us quickly build a powerful, multifaceted app that trades spreadsheets and paper for online dashboards customized by role, interactive color-coded calendars, automatic alerts and notifications, metrics reports that don’t take all day to compile, and easy access to job and safety documents. Everything is easier and more efficient with Quick Base. In fact, we’ve fast-tracked over 4,488 quality jobs since 2015.”

👍 Business Impact: Improvements in efficiency and automation have enabled managers to support more direct reports in the field. Those in the field take pride in the fact that Quick Base gives them a modern, more informed, more efficient, and safer way to work. Instant updates equal more visibility for Sturgeon and customers.

💡 Jesse Guardado’s Advice: “You don’t have to build all the functionality yourself. Take advantage of the broad expertise Quick Base Solution Providers have to offer. MCF Technology Solutions quickly provided us with a number of helpful solutions including a multi-picture, multi-file uploader that simplifies submission via iPhones and iPads of signed safety briefings, time sheets, and other documentation from the field.”
**Quick Win #5:**

“Spreadsheets didn’t catalog our data in a useful way…things weren’t getting followed up on properly. Now we can be proactive instead of reactive. We are reducing environmental impact and personal injury rates, too.”

- EH&S advisor for the company

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**Leading Oil Exploration Company Reduces Spills and Injuries**

“We are in the oil exploration and production business with 2,000 drilling locations across Canada. One of our biggest challenges was that incident and hazard identification data was stored in spreadsheets, which meant it couldn’t be centrally accessed, updated, or shared. Field supervisors were unable to proactively identify areas where people and the environment were most at risk. It also took too long to track reported incidents—and follow up on repairs.

Now that all incident and hazard data is housed in our Quick Base cloud app, field supervisors can track reports and repairs in real time. Features like drop down menus make it fast and easy for field personnel to enter and share dates and details of incidents and hazards. And the ability to effortlessly analyze all that data enables field supervisors to quickly identify trends and pinpoint drilling locations that hold the highest potential for problems.”

**Business Impact:** Quick Base’s convenience and ease-of-use in the field has led to a four-fold increase in hazard reports. The capability to trigger notifications based on data input has also reduced the time between report submission and follow-up repairs. Better hazard reporting has prevented an estimated 111 oil spills—a 23% reduction in one year—and faster access to risk analysis has helped drive an overall reduction in personal injury rates.

**The Company’s EH&S Advisor’s Tip:** “Online accessibility of Quick Base simplifies on-site reporting of incident and hazard data, which is good for both regulatory compliance and improved efficiency in the field.”

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Your Own Quick Win: How to Get Started

Quick Base Project Management Incentives:

- **Strengthen customer relationships/retention** and increase rates for on time/under budget completion.
- **Proactively communicate with all team members** by updating and sharing critical job information (e.g., work orders, photos, status, documents, etc.) in real time from any device.
- **Boost productivity and enhance team satisfaction** with applications that automate manual jobs and eliminate redundant tasks.
- **Improve safety and ensure compliance** by centrally tracking and auditing all EH&S incidents as they occur.
- **Accelerate growth** by maximizing revenue from better service, cross sell/up sell, faster billing, and more profitable projects.
- **Optimize decision-making** and better manage costs with data transparency across your organization in the office or at a site.

Quick Base Incident Tracking Incentives:

- **Reduce environmental impact and personal injury** rates by tracking all critical info.
- **Develop project plans and rapid response programs** and facilitate proactive hazard identification with better insights and instant notifications.
- **Minimize costs** by defining the right processes to meet mandates and keep your operations running safely and efficiently.
- **Improve employee confidence and productivity** by helping ensure a safe work environment.
- **Enhance employee/contractor/vendor safety** by tracking training, certifications, and more.
- **Make better decisions** with full data transparency across sites, incident types, root causes, and more.
No matter what industry you’re in, if you’re searching for an easier way to deliver consistent, on time/on budget project outcomes; striving to create a safer and healthier environment for your field services team; seeking happier and more satisfied employees and customers; and looking to escalate business growth, Quick Base is your answer.

The platform provides a quick, easy, and business-accessible way to help you and your team achieve it all with your own simply built, tailor-made apps. And with a user-friendly interface, the Quick Base platform provides a hassle-free and fast alternative to paper-based forms, emails, and texts in the field. Employees readily adopt it because it helps them accomplish day-to-day tasks with less effort, freeing them up to work on projects that drive higher value for the business.

Whether you’re just learning about Quick Base or you’re a seasoned expert, we’re got many ways to support your Quick Base journey and your success. Below is a sampling of the resources we offer, and all are just a button click or phone call away:

• Learn how it works
• Try it out with free trial or set up a 1-on-1 demo
• Check out Quick Base University training
• Sign up for webinars and events
• Contact the support staff, get online help, or ask the Quick Base Community
• Attend office hours with Quick Base guru Kirk Trachy
• Hire a Quick Base Solutions Provider
• Read Tips & Tricks on the Quick Base Blog
• Check out more customer stories

Are you ready to reap the rewards of simplified and automated Field Services Product Management and EH&S incident tracking in your own business?

Contact us today
Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes half of the Fortune 100.

To learn more, visit: www.QuickBase.com