



A Collaboration Success Story

Profile

- » KAI Design & Build is a national design and build company headquartered in St. Louis, Missouri that specializes in providing value-added building solutions using innovation, technology and collaboration.

Situation

- » In order to help KAI to reach its corporate objective of being a true collaborative business partner, KAI and Jonathan Jones Consulting enlisted the help of Quilogy.

Solution

- » Quilogy, using Microsoft Dynamics CRM, helped KAI to streamline, automate and reinforce collaborative business sales and project management processes to support corporate objectives.

Benefits

- » Increased Value to Clients and Stakeholders
- » Drives Team and Employee Collaboration
- » Increases Visibility to Business Information, Boosts Profit and Lowers Risks
- » Improves Sales Forecasting and Marketing Effectiveness
- » Fast Implementation and User Adoption

Key Solution Components

- » Microsoft Dynamics CRM 4.0
- » Microsoft SharePoint
- » Microsoft SQL Server
- » Collaboration Business Principles

Solution provided by:



Quilogy Corporate Headquarters
117 South Main Street
St. Charles, Mo. 63301
Phone: 1.866.784.5649
Email: sales@quilogy.com
www.quilogy.com





ENGAGEMENT OVERVIEW

A Collaboration Success Story

true core values

“KAI expects to grow and change as the economy, markets and communities we serve constantly change. KAI will stay focused on accomplishing our mission by staying true to our core values, one of which is being considered a highly collaborative business partner to our clients. We expect our employees to internalize our mission and live our values.”

Michael B. Kennedy,
President of KAI Design & Build



KAI Design & Build is a national design and build company headquartered in downtown St. Louis, Missouri with affiliate locations in Dallas and Fort Worth, Texas. Since their inception in 1980, KAI has been instrumental in reshaping the St. Louis urban environment by designing and building housing, K-12 schools, transit facilities, collegiate campuses, commercial buildings, sports and recreation facilities and healthcare buildings.

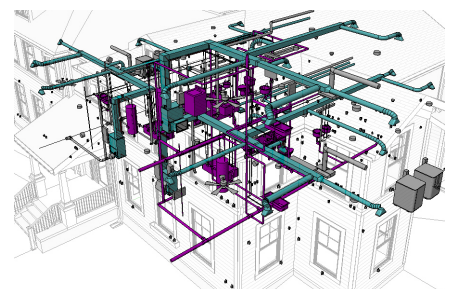
KAI's mission is being the leader in the design and build industry by providing value-added building solutions using innovation, technology and collaboration. While KAI maintains their sensitivity to form and function and exceptional project management from concept through operations, their real competitive advantage is being their clients' delivery-oriented design and build firm as a true partner to their organization.

To realize this competitive advantage and ultimately grow their business, KAI places a significant amount of effort in making sure that they are extremely transparent with their clients and that their employees and business processes are also highly collaborative. Being collaborative is not a slogan, it is the catalyst that drives KAI's design & build passion, in each employee, enhancing their ability to add value to a client's building strategy.

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change. KAI will stay focused on accomplishing our mission by staying true to our core values, one of which is being considered a highly collaborative business partner to our clients,” says Michael B. Kennedy, President of KAI Design & Build. “We expect our employees to internalize our mission and live our values.”

Evidence of this commitment to being a leader in innovation and technology is the investment KAI made in Building Information Modeling and Management or “BIM”. Virtual Design and Construction is the process of leveraging BIM capabilities to construct a project virtually, preferably before constructing that same project in reality, though a virtual model can be built at any time during the project lifecycle. “KAI and Michael Kennedy Jr., especially, are thought leaders in the industry. I have seen KAI relentlessly pioneer BIM methodology for the last several years and continually strive to improve the tools to make the design and construction process more collaborative and streamlined,” says Dawn Naney, Director at BJC Healthcare, Planning, Design, and Construction. To take advantage of the application of technology, the team members must understand how to collaborate.





SOLUTION OVERVIEW

Collaboration as Part of the Culture

tried
and
true

“I recommended Quilogy as the IT service partner because they previously demonstrated the creative aptitude and expertise to customize Microsoft Dynamics CRM to KAI’s critical business processes rather than dictating less effective and more complicated industry standard procedures,” says Jones.

Jonathan Jones,
President of Jonathan Jones Consulting



KAI’s collaborative work culture escalated in 2006 when they engaged Jonathan Jones Consulting, a management consulting firm that focuses on executive leadership and management, processes and results alignment, to assist them in creating a strategic plan that would empower KAI to become the leader in the design and build industry.

Jonathan Jones Consulting and KAI took a holistic approach to strategic planning by using disciplined business processes and creating a high trust work environment. To be collaborative with your clients, you must demonstrate collaboration within your organization, beginning with your leadership team. Jonathan Jones Consulting, as part of the KAI strategic plan implementation, taught and modeled collaboration to KAI employees and management teams.

“A high trust work culture can have a dramatic positive effect on organizations when everyone is committed and shares mutual accountability for achieving shared objectives,” says Jonathan Jones, President, Jonathan Jones Consulting. “Organizations can literally increase team performance and productivity by four to five times by creating a true collaborative culture.”

“To become a true collaborative partner for our clients, we needed 360 degree transparency across our entire company when it came to managing client interactions and projects,” says Kennedy. “No longer was it efficient for us to store client interactions and project information on individual laptops and computers.”

Another key strategy was improving the sales and marketing process to ensure KAI was optimizing their sales and marketing team effectiveness. The leadership team redefined the client focus of the company. The marketing and sales process became a complex matrix of contact lists, spreadsheets and task lists. Thus it became increasingly apparent that KAI needed to invest in a CRM tool to help manage sales processes.

Because implementing the new CRM tool would affect KAI’s most critical business processes, it was extremely important to locate a savvy, experienced and highly collaborative partner. Jones recommended that KAI hire Quilogy, a leading nationally recognized IT professional services firm and Microsoft Gold Certified Partner, to deploy the solution. “I recommended Quilogy as the IT service partner because they previously demonstrated the creative aptitude and expertise to customize Microsoft Dynamics CRM to KAI’s critical business processes rather than dictating less effective and more complicated industry standard procedures,” says Jones.

After the initial study, the proposed Microsoft Dynamics CRM solution provided a unified account and contact management system for sales and marketing, including all pipeline, Go/No Go matrixes, and marketing and proposal data repositories. It allowed project managers to enter contact information and client interactions into Microsoft Dynamics CRM instead of storing important client data on individual computers.



SOLUTION OVERVIEW

Collaboration as Part of the Culture

strong business processes

“The synergy between Jonathan Jones Consulting, Quilogy and KAI has resulted in stronger business processes that helped KAI exceed our business objectives in the past three years. Collaboration allows us to better support our clients and the community we serve.”

Michael B. Kennedy,
President of KAI Design & Build



Upon presenting the proposed process, KAI Vice President and Director of Architecture, Don Koppy, suggested an additional practical and collaborative approach. “Our busy project managers would not use such a system unless they saw value in the data. By automating our new project management tools into the system, we give the project managers a reason to use the system and we centralize all client contact information. From the prospecting process to building construction, all project related information feeds back into marketing materials for inclusion in proposals for similar projects.”

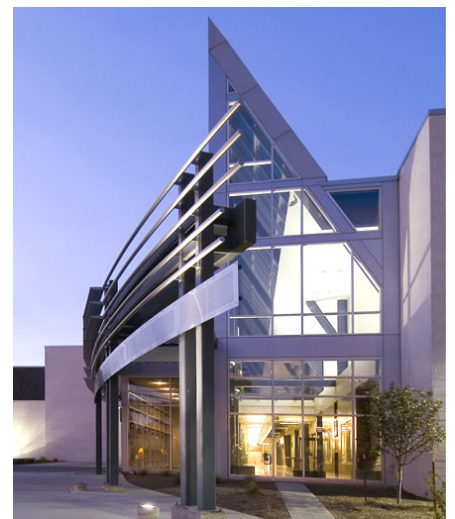
Koppy, Jones, and the project management team had created a project scorecard that empowered project managers to help manage project metrics, while providing transparent project reporting to the KAI leadership team for oversight. The consensus was to integrate the tools and increase the value of the automation.

Quilogy, using Microsoft Dynamics CRM, helped KAI to integrate and automate their project management processes by embedding the project scorecard as part of the client and project data. KAI tracks multiple project variables such as project scope, staffing, client delight, project profit, accounts receivable, schedule, budget, safety, communication and billing to ensure project health and client satisfaction.

The strategic plan process resulted in the development of key measurements for financial health of KAI projects. Leveraging Microsoft

SQL Server, the KAI IT manager was able to create a vital internal report for KAI’s financial system data that was available to project managers. Quilogy worked with KAI to use Microsoft SharePoint as a secure intranet, to provide one source for all vital project information on a need-to-know basis. “Managing healthy projects in a consistent fashion is the most direct way we provide exceptional service to our clients while ensuring healthy growth of our company and employees,” says Kennedy.

“The Microsoft Dynamics CRM solution is providing the collaborative platform to allow our employees throughout the organization to build stronger business relationships at every level,” says Kennedy. “The synergy between Jonathan Jones Consulting, Quilogy and KAI has resulted in stronger business processes that helped KAI exceed our business objectives in the past three years. Collaboration allows us to better support our clients and the community we serve.”





CLIENT RETURN ON INVESTMENT

Increased Value to KAI's Clients and Stakeholders

reduce
your
risks

“Microsoft Dynamics CRM is the perfect tool to reduce our risks in managing project health. These pivotal metrics have a profound effect on ensuring we keep our focus on each and every project we undertake.”

Michael B. Kennedy,
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The implementation of a focused, integrated strategic plan with Microsoft Dynamics CRM in a collaborative fashion, has created a single, consistent approach to managing the sales and project management process across the entire KAI organization. This, in turn, has empowered the company to become more of a trusted design and build partner to their clients.

KAI exceeded its 2010 strategic objectives by 2009, maintaining the size of its architecture capabilities, but increasing the quality and value to its clients through BIM services. In turn, the mechanical, electrical, and plumbing (MEP) engineering design services and construction management services have doubled in size. More importantly, KAI has increased its role in design and build projects as either the primary provider or as a collaborative partner with other respected firms.

Improves Staffing

Better forecasting allows the directors of architecture, engineering, and construction management to better plan their backlog and staffing requirements. The result of a larger backlog has improved KAI's ability to make sure the right person is on the right project and that employees are assigned to projects that will help them develop and grow in their careers. With the variety of projects at KAI, yet focused in key niches, KAI can develop more well rounded professionals.

Increases Visibility to Business Information, Boosts Profit, Lowers Risks, and Increases Client Value

According to Kennedy, KAI takes on several challenges that are common to the building and design industry. Increasing visibility and proactively managing critical project variables such as project scope, schedule, budget and billing is the key to short and long term success.

Improved reporting capabilities and transparency enhances decision making and allows KAI to respond quickly to changing project and business needs. Analytical reports are available in real time so they no longer have to wait for paper reports that could be out of date when produced.

The business intelligence provided by the solution helps KAI make an informed “Go/No Go” decision when deciding which potential projects to pursue. Pursuing the wrong projects can rapidly drain company resources and reduces customer satisfaction. Identifying upfront which projects fit into the KAI win matrix lowers risks and protects profitability, funding the growth of quality services.

Kennedy says, “Microsoft Dynamics CRM is the perfect tool to reduce our risks in managing project health. These pivotal metrics have a profound effect on ensuring we keep our focus on each and every project we undertake.”



CLIENT RETURN ON INVESTMENT

Increased Value to KAI's Clients and Stakeholders

client return on investment

- Drives Team and Employee Collaboration
- Increases Visibility to Business Information, Boosts Profit, Lowers Risks, and Increases Client Value
- Improves Forecasting
- Improves Staffing
- Enhances Marketing Effectiveness
- Fast Implementation, Easy Use & Support

QUILOGY[®]
The Art & Science of Business[®]

Drives Team and Employee Collaboration

The Microsoft Dynamics CRM solution is providing the necessary platform to enable KAI to become a value-added business partner to their clients. The defined business processes that align with KAI's strategic plan and the Microsoft Dynamics CRM solution are improving trust, transparency and productivity which are helping KAI to build stronger client relationships.

Improves Forecasting

Business intelligence gained from managing sales opportunities within Microsoft Dynamics CRM is used to forecast revenue and modify strategy as required. The system, in real time, can be used to determine whether there are enough qualified prospective sales opportunities in the KAI pipeline. KAI is able, at any time, to see which opportunities are at the different sales stages within the pipeline, how long it has taken them to get there and discuss strategies for closing more business.

Enhances Marketing Effectiveness

Centralized client and project data allow users from different departments such as sales, marketing, project management and senior leadership to access and manage consistent information. Marketing is able to more effectively communicate KAI's capabilities for potential projects with current and complete access to project details and client information. Microsoft Dynamics CRM's flexible viewing and

reporting capabilities also allow the sales and marketing team to analyze data by market segment, client type, and other specific criteria, enhancing the sales and marketing planning process.

Fast Implementation, Easy Use & Support

The on-premise solution was developed and deployed in a time frame that met KAI's time schedule and budget requirements. Because KAI uses a Microsoft-based infrastructure, the IT staff and users were familiar with Microsoft products making the integration smooth and enabling users to quickly adopt the new tool. The Microsoft-based platform also allows the solution to scale and be integrated with KAI's SharePoint portal.

For more information about KAI Design & Build, call (314) 241-8188 or visit their website at www.KAI-DB.com.

For more information about Jonathan Jones Consulting, call (314) 608-0783 or visit their website at www.JonathanJonesConsulting.com.

For more information about Quilogy Services, call (866) 784-5649 or visit their website at www.quilogy.com.