



Case Study

E2E Project Management Software Drives Increase in BAS Project Profitability

XL Automation Case Study



Introduction:

XL Automation is regarded as the premier provider of Building Automation Systems (BAS) in New England. With a reputation for being the “go-to” resource for engineering firms, contractors and facility managers, XL Automation had high expectations when seeking an end-to-end software solution. The goal? To accelerate the sales process, streamline project workflows, improve communications, and standardize business processes throughout the organization.



Challenge:

XL Automation struggled for years with a combination of Visio for drawings, spreadsheets for estimating and tracking job progress, and other miscellaneous software tools, resulting in poor synchronization between their estimates and drawings, inaccurate programming and installation labor estimates, and continual purchase mishaps. As a result, XL Automation sought a software solution that:



- Created project estimates that were not only accurate, but precisely synchronized with engineering drawings, and were representative of exactly what would be delivered;
- Guided the project management and installation process in a manner that eliminated missteps and oversights;
- Kept project documentation all in one place and team members all on the same page, and
- Ultimately allowed for greater project throughput from XL Automation's small team.



Solution:

After a painful process of experimenting unsuccessfully with multiple other solutions, XL Automation found D-Tools System Integrator (SI), which met all their requirements. This end-to-end business software solution combines estimating, proposals, system design and documentation, procurement, project management, installation, ongoing service and more.

SI is the only product on the market that utilizes a data-driven process that fuses detailed product information from the proposal directly with Visio shapes and AutoCAD blocks to ensure an accurate visual representation of the design, even as project change orders emerge. XL Automation worked closely with the D-Tools team to develop manufacturer-specific, industry standard SmartShapes™ which tie product data and control points together, creating the industry's first “smart” drawings.

D-Tools SI incorporates project and resource planning, scheduling, purchasing and materials management, task management, timekeeping, job costing and more to provide not just a full solution, but full transparency for XL Automation's operations team. As a result, not only is the entire project workflow streamlined, but internal communication is enhanced, and morale is at an all-time high.

Adopting D-Tools SI software has allowed XL Automation to:



Calculate manufacturer quota fulfillment levels automatically



Implement a more streamlined and accurate bidding process



Estimate labor time and cost more accurately



Reduce time spent managing projects, while avoiding missteps



Purchase only the products needed, and eliminate unwanted overstock situations



Quickly deliver updated and accurate job reports and as-builts to close out jobs faster



“The D-Tools team is always readily available and willing to help us solve a problem. We never feel like we are left to figure it out on our own.”

Nicole Niles, **XL Automation**

Results:

↑ 5%

Project profitability grew by 3.75% - 5% (\$140,000 on \$3.5M in revenue)

↓ 30%

Project estimates and proposals executed in 30% less time

↓ \$120k

Year-to-date savings of \$78,000 in material cost (\$120,000 annualized)

↑ 5%

Project management efficiency improved by 5%

↑ 8.6%

Product and material management accuracy climbed by 8.6%

↓ 10%

As-built and project closeout completed 5% - 10% faster

↑ 3%

Project upsell revenue increased by 1.5% - 3%

↓ 5%

Overstock product ordering expenses decreased by 3% - 5%

↓ 7%

Savings of 2% - 7% realized on admin and onsite project hours



Headquarters

1850 Gateway Boulevard — Suite 1060 Concord, CA 94520

Phone: 925.681.2326

Fax: 925.681.2900

d-tools.com

