



Trinity Technologies Adopts CenterView™ and Gains Efficiency Tracking Major Services Projects

For Trinity Technologies (Trinity), a leading provider of business consulting and technology solutions, tracking detailed project information is mission critical. Distribution of reliable, up to date project data can impact Trinity's bottom line. Historically, Trinity used a manual reporting process to track this information. To improve efficiency and allow executives to track and review the company's project details in a customizable and dynamic visual format, they implemented a Corda® CenterView™ performance dashboard.

Background

Trinity provides services and solutions to help their customers optimize enterprise content management technologies, which results in greater financial returns on IT investments overall. Specializing in workflow and process improvement solutions built around best-of-breed technologies, such as EMC Corporation's Documentum™ and Microsoft® SharePoint®, Trinity markets vertical solutions for industries, including energy utilities, manufacturing, engineering, design and construction, financial, pharmaceutical, and legal. Trinity selected CenterView to enhance the efficiency of their internal data retrieval process for projects from a broad market spectrum.

Challenge

Before implementing CenterView, Trinity manually created a financial report each week. Their Financial Administrator, Joanne Butler, gathered relevant data from multiple sources, including QuickBooks, spreadsheets, and a SQL database, and merged it into a single report. The manual procedure was extremely time-consuming. Butler had to spend between three and four hours every week generating the report.

In addition, the report didn't clearly highlight areas demanding immediate attention because of its inadequate data visualization. For example, companies over 90 days delinquent on payments needed to be flagged for immediate attention and action. Projects that had used more than 80% of their budgets also required immediate attention. On these projects, the project leaders needed to diagnose whether issues impacting the project stemmed from internal data entry errors and correct any such errors.

Finally, one of the most compelling reasons that Trinity decided to implement a performance dashboard was that the manual report simply didn't deliver their information in a timely enough way. The information in the report could be as much as a week old. To make the best decisions, they needed to be armed with up-to-date information, on-demand and in real time.

Solution

After exploring other dashboard solutions on the market, Trinity chose CenterView. According to Alice Voiss, Program Director, "One of the most impressive capabilities was CenterView's ease of use. The drag-and-drop interface offers great flexibility, both for our non-technical users and our technical users who demand a high ability to customize dashboards."

CenterView's ready-made templates also helped swing the decision in its favor. For example, Trinity needed a chart to show days sales outstanding (DSOs), and CenterView includes ready-made charts for DSOs. Between the templates and the flexible user interface, Trinity knew they had a solution with CenterView that would allow them to get up and running quickly and efficiently.



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Today, all employees who need to stay up-to-date on financial trends and project tracking can access Trinity's CenterView solution. Furthermore, the company's executive committee, who review company and project status in detail on a weekly basis, now have instant access to accounts receivable, DSOs, projects that have used more than 80% of their budgets, and more. And the data is automatically and dependably generated in real time.

More importantly, Trinity employees view all this information through a visually compelling performance dashboard that immediately draws attention to actionable information. For example, if a project is nearing 80% budget usage, the team can easily drill down into the details of the project, rapidly identify errors or project risks, and actively address them before they become an issue. For past due accounts, they can quickly and easily review a comprehensive invoice history.

Another valuable CenterView feature for Trinity is the collaboration tools. With these tools, a project team can place notes directly in the dashboard. As an example, for past due accounts, they can add notes that help them track a full history of customer contacts. These notes are easy for the entire team to access, which greatly improves the efficiency of communication. Butler says, "When I call a customer for payment information on an overdue invoice, I can pull up the dashboard and make a note on our Accounts Payable page. The entire team can immediately see when I contacted the customer and read relevant information about the results of our conversation."

What's Next?

For Trinity, CenterView has been so revolutionary in improving company processes, that in addition to evolving the functionality of their own dashboard, they plan to incorporate CenterView as a future enhancement to their customers' solutions. Trinity will develop sample dashboards to show their customers how real-time distributed data can enhance records management methodology—creating a potent competitive advantage for Trinity.

Conclusion

CenterView gave Trinity access to real-time information, was easy and fast to implement, and vastly cut reporting development time. It allowed them to see their corporate and project data in a visual format that drew attention to actionable issues. Trinity President Joseph Morray summarized, "Trinity gained a new level of control and corporate maturity by implementing CenterView. And while we see the potential for even greater internal returns, we also see a distinct market advantage for our own customers, who can in turn achieve significant reporting and tracking efficiencies on an enterprise level."



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