

Case Study

Background

FMG Engineering, a leading engineering consultancy firm with 150 employees, has been at the forefront of innovation and efficiency in the industry. Established to provide top-tier engineering solutions, the company recognised the need for a robust project management system that would integrate with NetSuite. FMG Engineering faced significant challenges with its existing project management tools, prompting a search for a more integrated and efficient Kanban Board solution.



FMG Engineering, an award-winning multi-disciplinary engineering consultancy, has been enhancing Australia's infrastructure for over 50 years. With a focus on development, property, and urban infrastructure sectors, they operate from Adelaide, Melbourne, Sydney, and Brisbane, delivering projects nationwide.

With expertise in Structural, Civil, Environmental, Forensic, Project Management, Geotechnical, Soils & Materials Testing, FMG Engineering is renowned for its technical excellence, and comprehensive services. They are respected and maintain relationships with builders, developers, councils and regulatory authorities.



Industry:
Engineering Consulting



Location:
Head Office - Unley, South Australia
Offices in Melbourne, Sydney,
Brisbane



Solution:
Kanban Boards for
NetSuite

The Challenge

FMG Engineering faced a fundamental challenge with its existing project management approach: a widespread reluctance among staff to engage with NetSuite for updating project information. As a result, project statuses were often outdated, and resource allocations were not accurately reflected, creating a significant disconnect between actual project progress and what was reported in the system. This gap undermined the company's ability to make informed decisions, manage resources efficiently, and maintain a competitive edge in the engineering sector.

To compound the issue, several teams within FMG Engineering had independently adopted Trello as their solution for managing projects. While Trello's user-friendly interface facilitated task management at the team level, it created data silos that were not integrated with the central NetSuite system. This lack of integration meant that updates in Trello did not reflect in NetSuite, leading to discrepancies between project management and financial reporting. The fragmented system made it challenging to achieve a unified view of project statuses, financials, and resource allocation, further complicating project oversight and management.

Recognising the need for an integrated solution, FMG Engineering explored an add-on for Kanban boards within NetSuite. However, the add-on fell short of expectations, offering only rudimentary functionality that did not leverage the full potential of a Kanban system. It was confined to a small widget on the NetSuite screen, limiting visibility and usability, and lacked the full-screen capability essential for effective project management. Moreover, the add-on was expensive, and following the acquisition of the provider, it was discontinued, leaving FMG Engineering with an unsupported tool that was cumbersome to use and failed to address the core challenges of project management integration and user engagement.



In Response

In response to these complex challenges, FMG Engineering initiated a strategic shift towards an integrated project management solution by adopting Kanban Boards for NetSuite, aiming to streamline operations and foster user engagement across the entire organisation.

The solution was meticulously tailored to align with the company's specific workflow requirements, ensuring a seamless fusion of project management functionality within the existing NetSuite ecosystem. The development strategy was collaborative, drawing on insights from key stakeholders across the organisation to ensure the new system addressed the diverse needs of the engineering consultancy. This comprehensive approach was pivotal in developing a system that not only enhanced operational efficiency but also resonated with the user base, encouraging widespread adoption and engagement.

The Kanban Boards for NetSuite was selected as it delivered a user-friendly interface, full-screen visibility, and direct integration with essential tools like Google Maps, significantly improving the accuracy of site records and project management capabilities.

These enhancements were designed to solve the core issues previously identified, such as data silos and the lack of real-time project updates, by facilitating a more intuitive and integrated workflow. The adoption of drag-and-drop functionality and customisable dashboards allowed for a more dynamic and responsive project management experience, bridging the gap between project management and financial reporting.

The Outcome

The implementation of Kanban Boards for NetSuite heralded a new era of efficiency and streamlined operations for FMG Engineering, transforming the way projects are managed and tracked. The solution's seamless integration into their NetSuite ERP means that real-time updates and accurate project information have resulted in a reliable trusted single source of truth.

The successful integration of Kanban Boards within NetSuite has had a profound impact on FMG Engineering's customer relationship management and strategic planning capabilities. By providing a centralised platform for tracking all customer interactions and project milestones, the solution has improved the sales team's ability to manage proposals, track engagements, and forecast future work accurately.

With enhanced visibility, project managers can now effectively monitor job progress, resource allocation, and deadlines, ensuring projects are delivered on time and within budget. This marked improvement in project oversight has led to significant reductions in wasted time and resources, directly contributing to industry-leading response times to insurer's SLAs, improved profitability, and client satisfaction.

"Since 2014, we have been using NetSuite. Before adopting Kanban Boards for NetSuite, our workflow lacked structure and was cumbersome for our users to update key information. If you can't get people using it, you can't get the most from it. If your data is not up to date, your reporting is inaccurate. After implementing Kanban Boards, everything changed. The Kanban boards and user interface have been game-changers for us. Improvements in how many users engage with the system and update data in the right place at the right time have allowed the business to rely on reporting derived from that data. Job and task statuses are now up to date, often in real-time, allowing us to report on SLAs for our customers who require them. Many of our tools are linked directly from the Kanban card representing the job, making the linked tool, document vaults, and templates context-aware, further tightening up the workflow for our team. Mapping data and visual representations of our upcoming work in the Kanban Boards for NetSuite have had a large impact on the efficiency of vehicle use and miles travelled. Our CRM game has dramatically improved, with our interactions, customer contact notes, and quotes won/lost or pending now in the best state they have ever been. Now, NetSuite is our trusted, reliable source of truth."

Iain Whyte, IT Manager



OneCloudX is the only local NetSuite ERP and Financial Planning partner with offices in Melbourne and Sydney who brings our industry specific operating model in Wholesale Distribution, Manufacturing, Financial Services, Professional Services, Software and Non-For-Profit built over a decade to our on-site implementations, optimisations and support.

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