

TACOMA ENGINEERS ENSURE BUSINESS CONTINUITY WITH ANYWHERE-MANAGEMENT OF CRITICAL FILES

This Canadian professional services firm needed to simplify and centralize the management of their critical information. Itergy provided a customized SharePoint-based solution that proved its value with the COVID-19 crisis.



Challenges

- 2000 construction projects a year
- 3 offices
- Manual or server storage

Solution

- Microsoft 365-based digital transformation
- Microsoft SharePoint-based custom content management solution
- Personalized managed services



Benefits

- Effective collaboration across offices
- Working more efficiently
- Competitive advantage
- Enable work from home
- Increased productivity

INDUSTRY

Professional Services to Construction

REGION

Canada

WEBSITE

www.tacomaengineers.com

Itergy's Expertise

- ✓ Productivity, Collaboration & Communication Solutions
- ✓ Power Platform [Power BI & Power Apps]
- ✓ Microsoft Technologies
- ✓ Cloud & Infrastructure Management
- ✓ Cloud Security
- ✓ Identity & Access Management
- ✓ Database Platform Management
- ✓ Managed Services

ABOUT TACOMA ENGINEERS

Tacoma Engineers is a consulting engineering firm providing structural engineering services to the private and public sectors. It has enjoyed over three decades of success by focusing exclusively on structural engineering.

THE CHALLENGE: HOW TO IMPROVE DOCUMENT MANAGEMENT AND COLLABORATION ACROSS THE MULTI-SITE FIRM

Tacoma Engineers needs a huge number of documents to support the work they do, whether it is helping an individual replace a beam in their kitchen or ensuring solid construction of a 15-storey building. For each of the approximately 2000 projects they manage each year, designs, plans, technical drawings, spreadsheets, reports, and commercial documents must be accessible by the key personnel involved across its different offices.

In 2016, Tacoma, like many of their fellow engineering firms, stored this critical information manually in binders, or on their central, internal server. While this system of document storage more or less met their day-to-day access needs, it was neither secure nor scalable. Furthermore, it did not allow past projects and documents to be easily referenced and capitalized on for current contracts. Additionally, while staff in each of the firm's three offices could upload or download documents, the system did not enable visibility over what colleagues in other teams or offices were doing, collaboration with those colleagues, or synergy across the company.

With no in-house IT specialists, Tacoma had already decided that a cloud solution would enable them to simplify their document-management and collaboration needs. However, they wanted to go further and find a trusted partner that could advise them, respond to their ongoing requirements to enable continuous improvement, and manage implementation and maintenance.

"We avoided a fragmented, silo-based approach to information-sharing for our growing team, with a common platform to address our issues and work out solutions for collaboration. "

Mike Gilles, BA, C.E.T, President

ITERGY'S SOLUTION: MICROSOFT 365-BASED DIGITAL TRANSFORMATION AND PERSONALIZED MANAGED SERVICES

Tacoma chose Itergy for its proven track record of providing customized solutions, the robustness of the Microsoft platform they are built on, and for the personalized service it provides to all its customers, large or small.

The local Itergy branch offered the firm of engineers cloud-based project content management, built on Microsoft 365, with a custom solution for Microsoft SharePoint. The goal was to provide team members with a way to have more and better information, as well as make it easier to locate and use as a team.

Additionally, since the initial implementation of Microsoft 365 in 2016, Itergy and Tacoma meet every two weeks to discuss how the firm can make the most of their applications to improve company-wide coordination and communication, and to identify possible add-on customizations to enable growth. *"Itergy often anticipates our needs and has been responsive in a helpful way. It's been one of the biggest assets for us,"* says Gerry Zegerius, Senior Associate at the firm, who leads the partnership with Itergy.



"We're so glad we were set up with Microsoft 365 and SharePoint. When the lockdown hit, we felt very confident we would maintain a good level of productivity, and we're seeing people get very creative in their use of the solutions. It's awesome."

Gerry Zegeerius, P.Eng., Senior Associate

BENEFITS: EFFECTIVE COLLABORATION, EFFICIENT WORKING AND COMPETITIVE ADVANTAGE

Email used to be the go-to method of communication for the firm, but Microsoft Teams messages are now the default. Teams meetings enable management to coordinate with engineers one-on-one, but also to continue the 30-year tradition of weekly lunchtime "show-and-tell" that fosters greater company cohesion, now with everyone all over the province.

"Itergy's solutions have brought our team closer together," says Tacoma President, Mike Gilles. *« That's difficult to measure monetarily, but it has helped us work more effectively. »*

"We've definitely reached our collaboration goal," concurs Gerry. *"We've always had a very open company culture, but now we have more continuity of culture throughout our different offices."*

The initial custom SharePoint project was delivered a few years ago with Itergy managing the solution since then to ensure that Tacoma continuously optimizes its use and leverages any technology updates and add-ons. Itergy also guides Tacoma on incorporating more Microsoft 365 products into their workflow.

The Teams component was set up in about a month before COVID-19 was declared to be a pandemic, and most of the western world went into lockdown. Tacoma Engineers seamlessly transitioned to working from home, with full access to the documents they need on top of the unrivalled teamwork they had already been experiencing.

"We didn't even miss a week on our lunchtime meetings," comments Gerry. *"I cannot imagine what this experience would have been like if we had been using our old teleconferencing software or had had to access our old server through the VPN,"* comments Gerry. *"It would have been torture."*

And the firm has also been fielding calls from business partners who are dealing with that problem, where in some cases large parts of the staff cannot access files. Tacoma's team on the other hand can access all the files at any time, from any of their offices and home.

"With this tool, we are agile, we are more professional, and we can enable our consultant teams, including external business partners, beyond what is standard for our industry. And that gives us a competitive advantage over companies that weren't prepared."

Gerry Zegeerius, P.Eng., Senior Associate