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Challenge: Bespoke Workflow Process Software for a Design and Build Company

1. Business Overview

Our company operates in the Design & Build sector, comprising a team of 30 professionals, including:

- CEO, COO, CFO

- Operations Manager, Communications Manager

- Project Managers, Assistant Project Manager, Site Managers

- Design Team Lead, Building Services Engineers

- Commercial Team Lead, Commercial QS

- Accountant Assistants

The team operates across multiple schedules:

- Operations Meeting Action Log – Updated weekly with new tasks

- Construction Programme – Tracks project phases and dependencies

- Design & Build Checklist – Outlines required tasks per project stage

- Work Package Procurement Schedule – Driven by the programme to ensure timely contractor appointments

With approximately 25 active projects at different stages, seamless collaboration, task assignment, and progress tracking are essential.

2. Current Challenges

Our existing workflow relies heavily on manual, Excel-based tracking, leading to inefficiencies such as:

- Lack of clear workload distribution: Employees lack visibility on assigned tasks, causing bottlenecks.

- Ineffective task management: No structured approach to assigning, tracking, and completing tasks with accountability.

- Limited communication & collaboration: Teams work in silos without a centralised programme outlining expectations per project. As a result, critical tasks are missed, and resources are constantly firefighting. Ideally, the Gantt chart and Work Package Procurement Schedule should be integrated into the software for each project, prompting task owners about upcoming deadlines. Every project should have a fully planned pre-construction and construction phase.

- No real-time feedback loop: Delays in identifying issues and implementing corrective actions.

- Inefficient costing & resource allocation: Manual tracking does not support dynamic cost monitoring against projects.

3. Key Functional Requirements

The proposed software must address these challenges by offering:

- Task & Workflow Automation: Assign, track, and monitor tasks with clear ownership and deadlines.

- Employee Workload Management: Provide visibility into each team member's workload and capacity.

- Real-Time Collaboration: Enable seamless communication across teams and departments.

- Timeline & Deadline Management: Automated updates and alerts for upcoming and overdue tasks.

- Integration with Microsoft Project: Synchronisation with project timelines and procurement schedules.

- Cost Tracking & Reporting: Allocation of professional hours and costs to specific projects.

4. Desired Features

- Project & Task Management: Ability to create projects, assign tasks, and track status.

- Gantt Chart View: Visual representation of timelines, dependencies, and milestones.

- Resource Allocation Dashboard: Clear insights into workload distribution.

- Automated Notifications & Reminders: Ensure timely completion of tasks.

- File Sharing & Documentation Management: Synch with our central repository for proposals, RFIs, and reports, linked directly to our SharePoint platform.

- User Roles & Permissions: Custom access levels for different teams.

- Custom Reporting & Analytics: Insights into task completion rates, project performance, and bottlenecks.

5. Integration Requirements

- Microsoft Project: Dynamic linking of project programmes and work package procurement schedules.

- Microsoft Teams/Slack: Real-time communication and updates.

- Financial Software (ABM): Integration for budget tracking and cost management.

6. Expected Outcomes

The selected software should:

- Streamline scheduling and task management for all employees.

- Increase transparency and accountability within teams.

- Enable better decision-making through real-time insights and reporting.

- Improve project execution by ensuring timely procurement and coordination.

- Provide a scalable solution that grows with the business and enhances operational efficiency.