

CASE STUDY

“With Citadon CW, we can easily reinforce process and ensure consistency – including standardization of terminology – in all of our documents across all market workspaces.”

COMPANY PROFILE

- The McIntosh Group
- Architecture/Construction
- Tulsa, Oklahoma
- <http://www.themcintoshgroup.com/>
- Citadon Product Purchased - Citadon CW



EXECUTIVE SUMMARY

The McIntosh Group (TMG) embarked on a nationwide restaurant remodeling project encompassing 900 job sites, thanks largely to the capabilities of Citadon's Collaboration Workspace (CW). Citadon CW is an electronic document management and collaboration platform that allows TMG to capture all critical project information from 200 design professionals and other supporting contractors. Citadon CW helps TMG effectively manage large-scale building programs by facilitating a standard method for processes and documents. It also gives TMG an up-to-date base of information on client projects, which can be extremely useful in gaining a head start on "roll-over" projects such as remodels, new construction, and relocations.

ABOUT THE COMPANY

Founded in 1998, The McIntosh Group provides process innovation consulting and architecture services to corporate, commercial and other clients who rely on developing, expanding, renovating and acquiring buildings to meet their business objectives. TMG works with some of the nation's top office supply and electronics retailers, and restaurant concept franchisers and management companies to deliver building openings as promised, thereby supporting its clients' ability to meet shareholder expectations. TMG's principals have extensive expertise in the key components of real estate development, project management, planning and information systems. TMG's service offerings in process innovation encompass business process reengineering, information systems and technology integration, and project management.

TMG clients include Kinko's, Office Depot, Wal-Mart, Cingular Wireless, Olive Garden, as well as Yum! Brands, which owns such well-known quick-service restaurant companies as KFC, Pizza Hut, Taco Bell and Long John Silver's.

THE BUSINESS CHALLENGE

In 2003, TMG was awarded a contract by Yum! Brands to manage the the conversion of existing Pizza Hut delivery/ carry-out assets to include a new concept called WingStreet in a co-branded configuration. As the program manager for the WingStreet conversions, TMG provides a wide array of services including:

- Engineering the business processes specific to the client's organization and developing process documentation.
- Developing process templates for use in managing and measuring business processes.
- Selecting and implementing off-the-shelf technology tools that support the clients' needs.
- Developing a web-application to provide program and project (schedule and management) information along with custom management reports.
- Business and technology training for the client's development team (including key vendors and consultants).
- Providing follow-up assistance, including advanced training, troubleshooting, maintenance and continuous improvement.

The project requires TMG to oversee and coordinate the work of approximately 200 individual(s) across approx. 40 companies nationwide across a wide range of disciplines. Some of these include architects, MEP (Mechanical, Electrical, and Plumbing), civil and structural engineers, equipment suppliers and consolidators, asbestos consultants, sign vendors and installers, and permit expeditors, as well as client personnel in operations, sales & marketing, construction, and property management.

The data shared by the team exists in a myriad documents – architecture layouts, signage layouts, review and approval forms, photos, HVAC (Heating, Ventilation, and Air Conditioning) tests and balance reports, asbestos reports, construction information, templates, analysis reports, construction documents, property management releases, building and sign permit information, etc.

To successfully execute the contract, TMG needed an online and on-demand collaboration solution that allows authorized users to view project documents at any time, from anywhere. TMG also wanted to minimize the cost and delays of messengering documents, and eliminate the inefficient, time-consuming chore of e-mailing document attachments for review and approvals.

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THE CITADON SOLUTION

To meet the challenge of capturing all essential program and project information and making it available to key project personnel, The McIntosh Group turned to Citadon's secure, hosted electronic document management and collaboration solution, Citadon CW.

Using Citadon CW as a foundation collaboration platform, TMG has set up separate “collaboration workspaces” for each geographic market for the WingStreet project. (The average market encompasses 30 projects, though some have as few as five, and others as many as 50.) Each workspace provides a secure, online, on-demand environment through which project team members from multiple organizations can share and exchange project documents.

Within each workspace, TMG creates folders for each type of project deliverable. When new deliverables are uploaded to their respective folders, an e-mail notification informs other team members who need to know and who may be required to take a specific action. For example, when the documentation for a client-approved remodel design is uploaded, a notification goes to the client's local property management team, who submits it to the owner of the leased property or properties for approval.

This approach to document management and collaboration is key to the success of TMG's business model. “We are managing all of the design-related activities in this very high-volume nationwide building program, and as a result we have introduced a different style of management,” explains Lanny McIntosh, founding principal of The McIntosh Group. “Traditionally, large-scale programs such as the WingStreet remodel project have been managed on a regional basis by construction managers and design consultants who typically track information differently, often using their own preferred tools such as spreadsheets. Now, with Citadon CW, we can easily reinforce process and ensure consistency – including standardization of terminology – in all of our documents across all market workspaces.”

McIntosh notes that having an up-to-date and consistently formatted information base is a valuable asset in enabling TMG to extend its work with the client. “After completion of the initial program, we are well-positioned to continue on further remodels, new construction, relocations, and more focused programs,” he says.

BENEFITS OF WEB-BASED DOCUMENT MANAGEMENT AND COLLABORATION

Citadon CW offers a number of valuable benefits for TMG, including:

- *Powerful search engine* supports TMG's “best practice” of creating precise naming conventions for deliverables. “Having consistency in document naming conventions ensures that when we run a daily query of the Citadon CW database – for all of the 300 or so projects we have in motion at any one time – we can readily identify the latest documents to be uploaded,” says McIntosh.
- *Tracking / audit trail capabilities* enable TMG to keep users accountable. Facilities for showing previous documents and their revisions, as well as complete document histories, are useful when determining whether documents have been uploaded on schedule. “We no longer have to spend a lot of time tracking people down and making sure they've finished what they are responsible for,” McIntosh says.
- *Open communications improves overall efficiency* – Stakeholders are sure they have access to the latest plans and documentation through Citadon CW, which saves time and improves end-to-end efficiency. “We are no longer wasting time trying to find the most current drawing or report,” says McIntosh. “Everyone can go to the one place and be sure they get the most current version.”

“Citadon CW is saving us significant time and money in document management and tracking,” McIntosh says. “It has impressively proven itself on the WingStreet project, and one of our goals for 2005 is to add more clients with high-volume building programs on Citadon. Bottom line: I can't imagine doing a large-scale program without a tool like Citadon CW.”