# LEADING CONSTRUCTION COMPANY STREAMLINES PERFORMANCE REPORTING THROUGH SHAREPOINT AND POWER BI

A leader in sustainable construction brings local insight and technical know-how to new-build, regeneration and development construction projects. Backed by the intellectual resources and global experience of the broader construction Group, their construction and development operations champion an approach uniquely suited to the UK context, based on collaborative thinking, cultural diversity and an engineer's appetite for complexity and innovation.

The company operates in a highly regulated industry and undertake monthly reporting cycles during which they review financial, environmental and safety performance across their sites.

Earlier methods of reporting involved a highly manual process for the collection and collation of data and involved retrieving information from numerous site managers and combining it into a master Excel spreadsheet. They needed a more efficient and streamlined process to support their reporting requirements and wanted to unlock greater insights into their data.

Intelogy introduced a central data repository, enabling site managers to submit monthly reports concerning various indicators of their site performance to a central SharePoint list. Not only did this enable easier access to the data but it greatly enhanced its integrity and structure, whilst simultaneously removing the administrative overhead of manual data collection and collation. This enabled the creation of an immersive and interactive experience via a series of specialised Power BI reports, which facilitated new, actionable insights into their operational practices.

# CHALLENGES

Site managers were tasked with collecting data manually each month from their construction sites. Excel spreadsheet templates were emailed to site managers for completion, after which they would be returned to the head office and compiled into a master Excel spreadsheet. It was important to ensure that the accuracy and integrity of data was maintained during this process, and this consequently represented a significant investment of both time and effort. With no established visualisations of data, the depth of insights into business performance was limited.



# SOLUTION OVERVIEW

Intelogy held a requirement gathering workshop to understand the existing reporting process, whilst also exploring opportunities for improvement. Emphasis was placed on removing the reliance on email communication, eliminating the need for the manual collation of data, and providing an overview of completion status. Intelogy were also able to extend the scope with previously collected data to support a more diverse range of data visualisations.

Intelogy identified that the previous reporting process was subdivided by data of different sources and timeframes. These included monthly head office reports, site-specific reports, quarterly reports, and yearly targets. Through the architecture of an intelligent solution that used SharePoint lists and content types, Intelogy were able to centralise the data capture process. Furthermore, by ensuring that a calculated date value was assigned to each of these records in each of these lists, Intelogy enabled relational data analysis within subsequent Power BI reports.
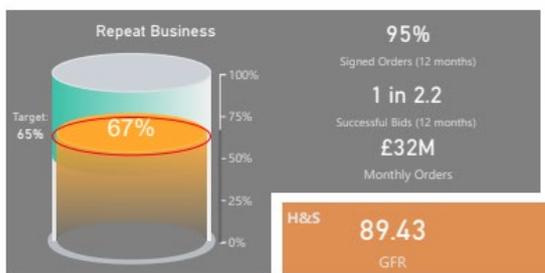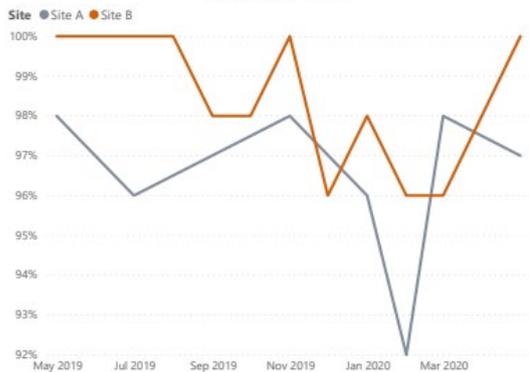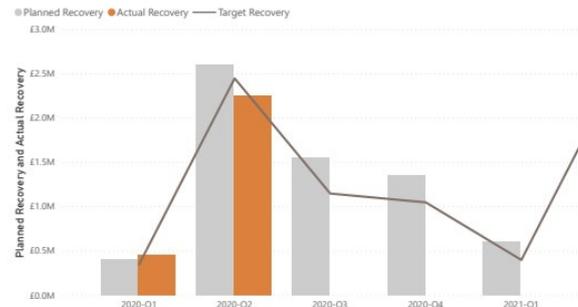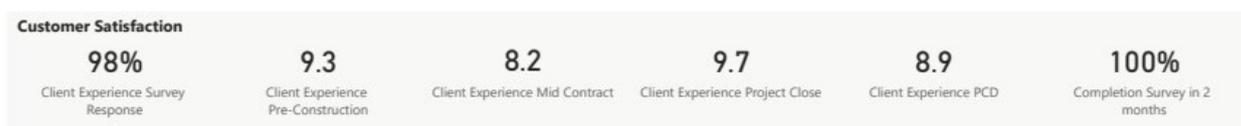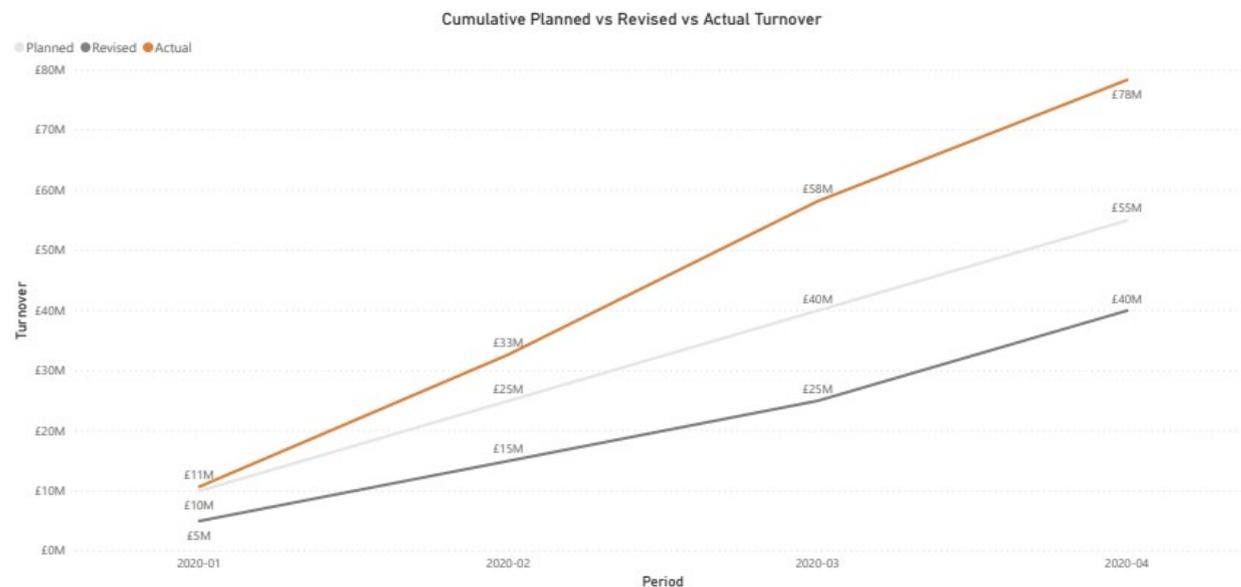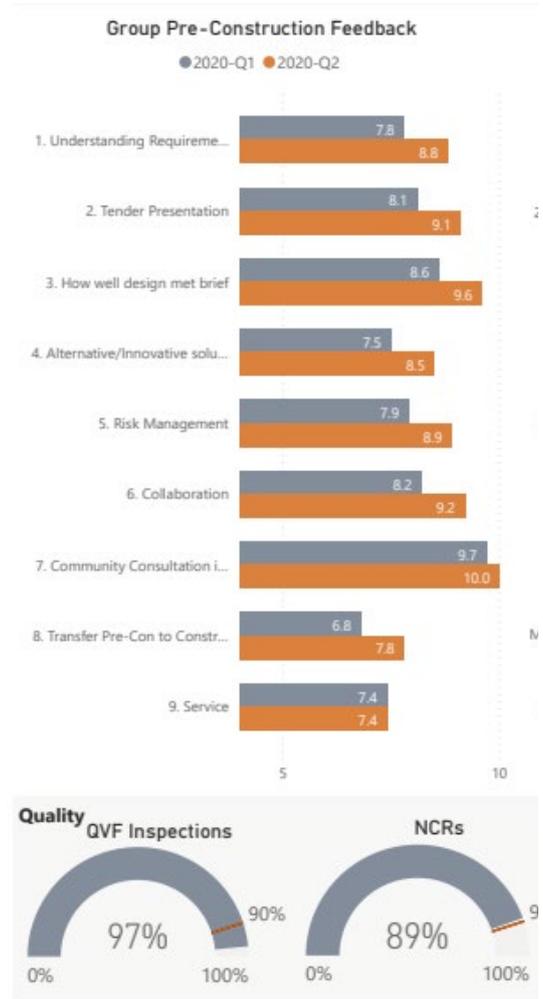
With this newly introduced data storage solution, it was now possible to seamlessly surface, model and visualize the data within Power BI. Intelogy created two standalone Power BI reports – one which served as a direct replacement to the prior spreadsheet, and another entirely new report created to take full advantage of the rich feature-set of Power BI. Both reports were thoughtfully designed around a single slicer, allowing the selection of a date-period to reflect across all visualisations on the report, which could be further refined by the integrated data interrogation capabilities of Power BI.

Intelogy were able to create a sophisticated dashboard experience that made full use of the extensive styling and visual options available in Power BI, providing at-a-glance insights into the data and business performance.

**Group Pre-Construction Feedback**

● 2020-Q1 ● 2020-Q2

| Category | 2020-Q1 | 2020-Q2 |
|---|---|---|
| 1. Understanding Requireme... | 7.8 | 8.8 |
| 2. Tender Presentation | 8.1 | 9.1 |
| 3. How well design met brief | 8.6 | 9.6 |
| 4. Alternative/Innovative solu... | 7.5 | 8.5 |
| 5. Risk Management | 7.9 | 8.9 |
| 6. Collaboration | 8.2 | 9.2 |
| 7. Community Consultation i... | 9.7 | 10.0 |
| 8. Transfer Pre-Con to Constr... | 6.8 | 7.8 |
| 9. Service | 7.4 | 7.4 |

**Quality**

QVF Inspections — 97% (90%, 0% to 100%)

NCRs — 89% (0% to 100%)

| Activity | Margin | Orders to Date | Pipeline |
|---|---|---|---|
| **£20.17M** | **3.72%** | **£190.99M** | **£760M** |
| Goal: £270M (-92.53%) | Goal: 3.40% (+9.41%) | Goal: 750.00M (-74.53%) | Goal: £600M (+26.67%) |

**Cumulative Planned vs Revised vs Actual Turnover**

○ Planned ● Revised ● Actual

Turnover (£0M to £80M) over Period (2020-01 to 2020-04)

Actual: £11M, £33M, £58M, £78M
Revised: £15M, £25M, £40M, £55M
Planned: £5M, £10M, £25M, £40M

**Customer Satisfaction**

| 98% | 9.3 | 8.2 | 9.7 | 8.9 | 100% |
|---|---|---|---|---|---|
| Client Experience Survey Response | Client Experience Pre-Construction | Client Experience Mid Contract | Client Experience Project Close | Client Experience PCD | Completion Survey in 2 months |

# RESULTS

Intelogy's solution modernised and simplified the business performance reporting process, resulting in a vast reduction of manual workload. It also consolidated and centralised data storage to the Cloud, which empowered the company to fully utilise this data within the Power BI Service. The viewing, interpretation and sharing of the most up-to-date versions of these reports became seamless, without incurring any risk of creating multiple versions of the truth.

Through the powerful options within Power BI, Intelogy surpassed expectations and delivered a visually appealing, data-intelligent reporting dashboard. At a glance, anybody with access to the dashboard can see the overall performance of multiple construction sites, and it is therefore much more efficient to obtain more substantial insights from site data and subsequently inform later conclusions or actions.

## CONTACT US IF YOU NEED SUPPORT WITH A SIMILAR PROJECT

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