

Case Study

Union Square

UNION SQUARE

Summary

The integration of Yellowfin's BI solution into Union Square's information management platform has enabled Union Square to:

- Exploit Yellowfin's reporting and analytics capabilities to deliver a competitive offering to construction industry clients
- Enable clients to quickly and easily generate reports, extract project information and visualize it in a meaningful way through graphs, tables and dashboards
- Enable clients to gain a clearer understanding of the information stored on the Union Square platform, including individual project activity and finances, in order to improve processes and achieve competitive advantage through data-driven decision-making

Company

Union Square provides knowledge management solutions to the construction industry. Headquartered in the UK, with offices in Australia, Canada and Sweden, Union Square helps organisations efficiently manage and control data, documents, emails, drawings and financial information. Over 40,000 users – from over 400 companies and across 15 countries worldwide – use Union Square to save time and money through supporting project delivery and business operations.

The company's flexible and customizable information management system helps architects, engineers, consultants and contractors of all sizes to better manage their projects and finances. For design professions and consultancy firms, it also offers specialized project accounting systems, which are designed to enable both financial and technical staff to access real-time project performance figures – without the need to extract spreadsheet data.

Union Square's clients include Balfour Beatty, VolkerVessels, Osborne, Grimshaw, Zaha Hadid and Rider Levett Bucknall.

Challenge

Construction firms around the world rely on Union Square's solutions in order to more effectively manage their construction projects. The key to the popularity of Union Square's software is its ease-of-use, combined with the fact that it integrates all the business processes that construction firms need to be transparent, efficient and profitable in one management system.

Union Square prides itself on listening to its customers, taking on board their feedback, and regularly updating its software to ensure that it meets with the evolving needs of the construction industry.

One element of the Union Square solution that customers had pinpointed as needing a renewed focus was the graphical and visual representation of data. The system had an inbuilt

reporting and query tool that allowed powerful database interrogation and reporting. However, the output was very transactional. To supplement these existing reporting capabilities, and to begin to satisfy customer demand for graphical reporting, Union Square had also embedded Silverlight charting for onscreen visualization and introduced Excel web-query reporting to support data interrogation. But, combining these multiple technologies proved cumbersome, messy and failed to fully address the reporting expectations of Union Square's clients. What Union Square really needed was a new, integrated solution that visualized data in an engaging way.

In light of growing commercial and competitive pressures, as well as increased customer demand, Union Square decided to look for a powerful, intuitive, and easy-to-use reporting and analytics tool that it could actually fully embed into its class-leading knowledge management platform.

"Union Square required an embedded Business Intelligence [BI] solution that was consistent with the affordability levels of our markets, while being sufficiently intuitive to suit the skill set of a wide range of professions within the construction industry," said Union Square Managing Director, Richard Vincent. "In addition, it was of prime importance to Union Square to choose a BI solution vendor with excellent development and customer support to help us get our embedded BI module to market as quickly and seamlessly as possible."

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Solution

Partnering with the right BI supplier was of utmost importance to Union Square and the company took time to assess numerous providers and their product offerings. Union Square identified that they not only needed a world-class BI partner that was approachable and flexible – both technologically and financially, but one that also had a similar working culture to its own. Union Square chose Yellowfin as its embedded BI partner because it matched the brief at all levels, from technical engagement through to client-side pre-sales support.

“BI has been an area of strategic importance for us for some time,” said Vincent. “Having embarked on a highly detailed review of the market, and the leading players within it, Yellowfin stood out as a business that not only had the right product set for our clients, but also had an approach to doing business and a culture that complimented our own.”

Key features of Yellowfin’s BI tool that made it stand out against competitive offerings were its ease-of-use, which made it an ideal solution for use by a wide range of different workers, from onsite contractors to consultants and architects – not just IT. Though highly intuitive, Union Square also found Yellowfin’s analytics technology and end user report authoring capabilities complimented its own enterprise solution, providing deep and valuable insights into clients’ management information stored on the Union Square platform.

“Union Square’s clients expect a high level of flexibility from our application, which is particularly true when it comes to reporting and analytics,” said Union Square Product Director, Peter Wakefield. “We were keen to provide an environment that would streamline our consultancy services but, more importantly, would promote a level of self-sufficiency.

“As many of our customers are SMEs, having a BI solution that is usable by operational staff, rather than purely specialist IT professionals, is imperative. Yellowfin’s intuitive interface is incredibly simple to use and follows design metaphors with which people are often already familiar. Yellowfin’s BI platform offers a rich feature set, which simultaneously allows users to discover new capabilities at their own pace.”

The standard Union Square implementation of Yellowfin is deployed to the clients’ existing Windows Web server, which is typically provisioned on premise. For more scaled out systems, Union Square offers the option of a dedicated BI server, again running on the Windows technology stack. A single data connection is made to the Union Square database, which runs on the MS SQL Server platform.

Results

Union Square’s new embedded BI capabilities enable clients to quickly and easily generate reports, extract project information and visualize it in a meaningful way through appealing charts, tables and dashboards.

“The power and flexibility of these combined products will help Union Square’s customers enormously when it comes to analysing their business and visualising trends and KPIs,” said Vincent.

Union Square clients working in professional services and financial roles find the tool helps when tracking, understanding and acting on metrics such as project profitability, sector and office performance, staff utilization and availability, billings and debtor profiling. In the contracting sector, Yellowfin dashboards help clients to track and control bid management success, supply chain performance, project quality management and risk management.

“We’ve found that clients are very intrigued with the new BI capability,”

said Wakefield. “Customers are going beyond the standard dashboards provided and are interrogating other aspects of the management and project information controlled by Union Square to create their own powerful insights.”

In fact, embedding Yellowfin produced immediate direct benefits, with Union Square securing a new client of significance in the architectural space.

“The ability to demonstrate powerful and intuitive graphical reporting, to an audience appreciative of visual representation, was very important in winning leading international architectural practice, Scott Brownrigg,” said Wakefield. “Architects in leading design firms are highly visual people, so the inclusion of Yellowfin as an embedded part of our solution has led to much better engagement in areas like project financial management.”

Vincent and Wakefield said that Union Square’s working relationship with Yellowfin underpinned the success and its clients had enjoyed with its embedded BI capabilities.

“We are delighted to be working in partnership with Yellowfin to revolutionise the way that our clients report on the immensely rich set of data that the Union Square platform is managing for them,” said Vincent.

“Yellowfin have been excellent to work with,” added Wakefield. “Culturally, our businesses are very similar in regards to our respective approaches to market and customer service. Yellowfin have been fun, flexible, supportive and creative in helping Union Square deliver world-class analytics and insights to its clients.”

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