

# Leach Wallace Finds Paperless Efficiency In The Field With Fluix

SUCCESS STORY



Leach Wallace Associates (LWA) is a U.S. consulting engineering firm that provides comprehensive mechanical, electrical and energy systems design services for institutional, commercial, industrial and government clients. LWA's business depends on the efficiency of their engineers in the field. The company realized that many existing processes were wasting time and not making the best use of their team resources. To solve this they turned to Fluix's Paperless Workflow solution.

## Challenges

- 1 Field team spent valuable on-site time on tasks like flipping through printed binders
- 2 Only senior level engineers were capable of doing a majority of the work
- 3 Delays occurred when a new engineer picked up partially completed work

## Solutions

- 1 Use Fluix to digitize tasks as fillable PDF forms with all equipment units pre-listed so needed information is readily available
- 2 Delegate checklist post-processing to office staff with instant data delivery
- 3 Add ability to postpone and reassign tasks to other engineers within a project

## Results

- 1 **Simplified on-site process** that can now be used by both senior and junior engineers
- 2 **More work done** with accelerated task execution and instant data turnaround
- 3 **Document collaboration streamlined** with Fluix workflows and messaging capabilities

## LWA Finds Big Efficiency Gains Going Paperless

LWA focuses on quality and value of its engineering services as key differentiators vs. competitors. This strategy is validated by 80% of the company's work coming from repeat customers. To accelerate their growth, LWA realized they needed to streamline and optimize existing business processes, both in the office and in the field. With a staff of 130, and dozens of simultaneous projects, it was critical to manage team resources effectively, reduce time needed for each job and minimize the chance for human error.

LWA was able to make the most dramatic efficiency gains by going completely paperless with Fluix:

- 1 Field tasks are prepared in the office as automatically generated checklists
- 2 Field workers access, complete, and submit the forms on their iPads
- 3 Documents are electronically signed by building owners on site
- 4 When stakeholders are not available in person, signatures are obtained via email
- 6 Collected data is instantly turned in for the next workflow participant to work on

*With Fluix, we have instant access to see the status of documentation as it is completed in the field. Being able to check-in on document status online saves us from making costly and unnecessary trips to projects.*

Michael A. Collins  
Commissioning Manager

## Subcontractor Supervision Got Easier

An effective supervisor has good relationships with competent and reliable subcontractors who do not require constant management. Still, having real time insights on the work status mitigates the risks of slipping project deadlines.

Fluix automates the document flow, and makes it possible for supervisors to see who's working on which task and when they start and finish it. They can even look at the form contents being filled in, which is especially useful for long checklists that LWA uses for inspections.

With so many moving parts, progress tracking is often overlooked. LWA staff can now quickly detect and act on schedule inconsistencies, ask about potential issues and give feedback on the work performed. Subcontractors maintain an open line with their managers which keeps them focused and on track.

***Fluix is the best tool for distributing, tracking, and collecting documentation during the building commissioning process. It is a perfect fit for the custom forms that are essential to our business.***

Rick Snyder  
Senior Commissioning Agent

## Field Team and Office Staff Working in Harmony

While being geographically distributed, office staff are no longer strangers to contractors in the field. The latter don't even have to pay regular visits to interact with office staff, picking up the work, turning in completed documents, or reporting what they are doing.

The collaboration happens seamlessly with round-trip form filling, document annotations, and accompanying messaging by multiple users, according to their roles in the process. Reassign, review, and approval scenarios are now everyday practice across the company.

The Fluix administrator configures the workflows, while the field team can focus on their core competencies and perform their job more efficiently. Also, getting new employees trained is a straightforward and simple process with a gentle learning curve.

With Fluix LWA has maximized the output of their field team and found the path to effective coordination between office staff and contractors in the field.

Contact us to make a step forward

e-mail: [sales@fluix.io](mailto:sales@fluix.io) | website: [fluix.io](https://fluix.io)

Try Fluix For Free