

## MWH Energy & Infrastructure (formerly Harza Engineering)

Engineering is about control and precision. The business of engineering is no different. Multiple departments — from engineering and project management to marketing and administration — must exchange enormous amounts of information about clients, prospects and other relationships to ensure that the firm runs smoothly and grows and that client needs are being addressed. Without adequate tools to manage that information, firms at best operate inefficiently, and at worse can spin out of control. MWH Energy & Infrastructure (Harza) understands the importance of managing relationship information.



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CLAIRE DEWAR  
IT PROJECTS  
DELIVERY MANAGER,  
MWH ENERGY &  
INFRASTRUCTURE

### Regaining Control Over Information

Claire Dewar, IT Projects Delivery Manager at Harza, recalls that the firm’s systems for managing client relationship information had been a little awkward. “We were still using a variety of platforms, including DOS-based technology. We upgraded to Microsoft Windows and Office, and set up a network where people could communicate with each other over the system. But everybody was using their own spreadsheets and databases to manage information.”

Dewar says that with so many isolated silos of data, getting a handle on firm relationships was difficult. “Our business development efforts were not being served well. For instance, any time a firm mailing went out, it was a huge effort bringing this data together, eliminating duplicates and reconciling inconsistent data.”

Moreover, with client information so thinly dispersed among the users, Harza had no way of leveraging its data for competitive advantage. “Each individual had their own slice of the pie — but there was no pie from which to draw information.”

The firm conducted a search for a new software solution. They considered the two most well-known contact managers at the time — *ACT!* and *Goldmine*. Those programs didn’t provide the scalability that Harza was looking for, nor did they store contact information in a way that would minimize database maintenance. They chose, instead, LexisNexis® InterAction®, a full-fledged customer relationship management (CRM) tool designed specifically for the needs of professional services firms.

InterAction provides a centralized database in which all client relationship information can be stored and shared between authorized users. Dewar says the tool’s ability to scale up to a virtually unlimited number of users was of utmost importance. She also liked how it streamlined data entry and maintenance. “That’s one of InterAction’s biggest selling points. Anything to make it easier to maintain the data was attractive to us.”

### Simplifying Project Managers’ Jobs

Project managers serve as the hub of a client engagement. They coordinate the engineers, outside contractors, and CAD designers, and ensure that things are progressing according to plan. They also are a primary liaison with the client. Dewar says that managing the vast volume of communications generated by a project can be difficult. “Project managers need to understand who’s talked to whom, when, about what and the results from those conversations. They might have to call seven or eight people simply to find out the current status of a project. Or they might e-mail everyone on the team and wait for their responses. They must have this information to be well informed before talking to clients.”

According to Dewar, the communications process has been greatly simplified. “Now they can just go to InterAction and open up the project folder and all the information is there. They don’t have to phone people and wait for them to return their calls. And they don’t have to sift through hundreds of e-mail messages to find those relevant to a particular project. It consolidates the information and makes it much more convenient to find.”

InterAction works on a folder system — similar to Microsoft Outlook. Users can create folders for projects or directories and link contacts into the folders without creating duplicates in the database. Dewar says this flexibility has allowed her to offer users unique views to data that are of great value. “We created a company ‘yellow pages.’ If a user is searching for a company in the hydro power industry, for instance, he can simply double-click on a folder for that industry. It will instantly retrieve a listing of 150 Harza contacts in that industry.”

The firm also does a substantial amount of business overseas. In the past, users had difficulties locating information on international clients, simply because their names were hard to spell. InterAction’s “sounds-like” feature resolves this problem by enabling users to guess at a spelling and retrieve the correct contact. “For many of our users, this is their favorite feature. All they have to do is type in something even remotely close. They don’t have to know the exact spelling to find the client information they’re looking for.”

Significantly, Dewar notes that due to InterAction's ease of use and value, it is no longer just the secretaries and administrative staff who are adding new contacts or folders into the system. "Within the first three months of the InterAction rollout, over 7000 new contacts were added to the system. It's amazing. And project managers are creating folders and linking contacts into them on their own. That is a really big step forward for us."

Indeed, shortly after training on the new software system, Dewar observed a significant increase in the number of clients and prospects on the firm's mailing list. "Our annual review mailing took place about three weeks after the first InterAction training class. During that period, the number of contacts designated to receive the mailing quadrupled over the previous year!"

### Streamlining Marketing Activities

Harza's annual review mailing is their most important marketing event. Distributed to all customers and prospects, it showcases the firm's accomplishments of the year.

Prior to the InterAction rollout, managing the annual review mailing was difficult. It started with the assembling of the mailing list. "We had as many as 30 different secretaries who maintained lists on behalf of individuals within their groups. They had the horrendous task of consolidating these different lists and eliminating duplicates before providing them to us. To compound the problem, most of the lists were in Microsoft Word documents and not in a database format."

Once each of the 30 lists was compiled, it had to be combined and reconciled into a master list for the firmwide mailing. This entailed another time consuming and laborious process. Nicki Orgler, a corporate communications assistant at Harza, was charged with this responsibility. "Once I received all the lists, I had to put them together. It was complicated because there were many duplicates. A name could pop up in five different lists with conflicting information, such as varied name spellings."

To consolidate the information, Orgler had to print out each contact on a separate sheet of paper, place them in alphabetical order, and then figure out how to resolve the conflicts one at a time. Once she did this, she had to reconfirm the accuracy of the information, then copy and paste each contact record to get it back into the master database. She recalls, "It was a nightmare."

From a dollars and cents perspective, the toll of the annual review mailing added up. "I would start on this project about four months prior, and work on it half time — about 20 hours per week. This doesn't count the time it took the individual secretaries to compile their initial lists."

According to Orgler, InterAction eliminated this massive drain on the firm's resources. "We no longer have multiple lists — all the information is now in one place. The secretaries don't have to spend time compiling mailing lists for me, and I don't have to waste time merging those lists." Indeed, Orgler reports stunning gains in efficiency. "With InterAction, we took a project that used to take 20 hours a week of my time over four months, and boiled it down to two hours. That is awesome."

Because of the massive effort required to conduct the annual review mailing prior to implementing InterAction, Harza's marketing department did not have the resources for other major projects. Orgler says that this has changed. "Since we started using the software, we're able to conduct additional campaigns. For instance, we started a client newsletter called *Dimensions*. We're able to send out special announcements when newsworthy events happen, such as a new partnership. We're able to get our name out there in the marketplace more."

Inevitably, users will have questions about any software package they use. This is why choosing a package that offers good technical support is of the utmost importance. Dewar remarks that InterAction's support staff has been exceptional. "Customer support is terrific. I know that a human voice will answer the phone. If they don't have the answer immediately, they will get back to me with one, and it will be the right answer. I don't get put on hold forever, which is so frustrating, and happens with a lot of other companies."

### Managing Relationship Assets

An engineering firm's most important assets are the relationships it forms with clients and contacts. Effectively managing these relationships involves much more than simply warehousing name and address information. It requires a commitment to work as a team, share information, and focus on activities that maximize client satisfaction. Harza, no doubt, knows this. And they have built a technology infrastructure to follow through on this commitment.

