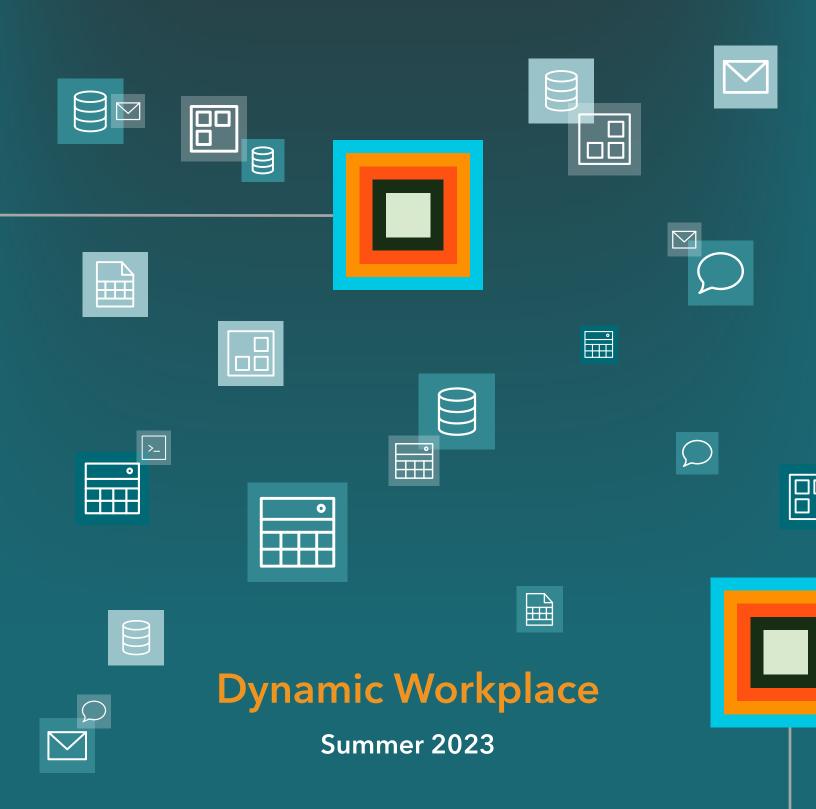# quickbase

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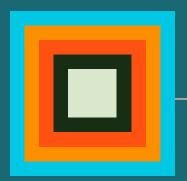
Dynamic Workplace

Summer 2023

Contributors

Lina Agudelo, *Events Marketing*

Tess Cloud, *Graphic Designer*

Tiffany Cuddihy, *Senior Copywriter*

Joe Demski, *Content Marketing*

Elise Freedman, Content and Creative

Caroline Englert, *Customer Marketing*

Bridgette Hightower, *Events Marketing*

Beth Hyland, *Events Marketing*

Josh Henderson, *Content and Creative*

Nick LaFleur, *Content and Creative*

Matt Lieberson, *Content Marketing*

Steve Miller, *Graphic Designer*

Jon O'Toole, *Content and Creative*

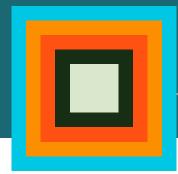Eric Olson, *Chief Marketing Officer*

Molly Sullivan, *Brand Experience*

Contents

State of Work Today

We are entering a new age of workforce productivity. AI, automation, and no-code solutions have fundamentally changed the digital work landscape – and it's driving a massive shift in the way we work.

From the old Structured work to the new Dynamic work.

Companies that are winning today are embracing this new way of working and unlocking the full potential of their workforce.

Companies that are still trying to get work done in the old way are drowning in inefficiency. Their teams find temporary solutions, wasting time doing Gray Work between multiple ad-hoc tools, costing businesses billions of dollars in lost productivity every year. Dynamic Enterprises are adaptive, innovative, and highly engaged – leading to increased productivity and growth.

Yet, companies still struggle to unlock that potential. Spreadsheets and databases, Project management and collaboration tools, purpose-built solutions, or developer platforms – they either do not scale with complexity, OR only solve very specific functional challenges, OR are too complex for everyone to use. Existing solutions are not working.

That's why we built Quickbase, a powerful application platform designed for dynamic work. With its unified platform, Quickbase empowers companies to effortlessly see, connect and control their most complex projects and processes.

quickbase.com

Community Perspectives

> Workforce productivity in the US is declining faster than ever since the early 1970s. Doesn't work feel much harder than ever? So why is that?

"

Repetitive tasks.

Ambiguously defined processes.

Lack of integration between functions.

Merging information from multiple systems.

Chasing data and redundant systems is my frustration.

Data at the edge is generally poorly organized and difficult to access in other workflows.

> What is the gray work that you spend most of your time on?

"

Data dumpster diving.

Gathering data from multiple sources and adhoc reporting.

A LOT of end users have no idea how much gray work is involved in bringing them a solution.

Most of my job right now is just trying to clean up and plot out the gray work.

Tracking productivity and seeking customer feedback.

Lack of training results in gray work. Training & instructions would help with the adjustment period.

Mastering Built Environment Processes:

6 Questions with Anthony Offredi

As builders continue to find their way in the wake of the pandemic, the importance of effective planning and execution cannot be overstated. Anthony Offredi, Director of customer advisory at Quickbase, is a low-code mentor for manufacturing and a leading voice in the field of mastering the built environment. In a recent podcast interview, Offredi discussed how to build a culture of discipline and standards, identify and mitigate risk, and how he helped improve the building launch process at Amazon. His insights are invaluable for any business leader seeking to optimize their processes and achieve success.

Here are six questions from Offredi's interview that offer a taste of his expert advice.

1 **Why are discipline and standardization necessary components for businesses to scale and succeed?**

Let's begin with an important process to follow in order to be successful. Make sure you follow the four P's people, plans, parts, and process. The process is making sure that everybody understands what exactly they must do, when they have to do it, how they have to do it, where they have to do it, and why they have to do.

For a business to scale, it has to count on all of the individual parts doing the same thing. Amazon for example, is all over the country, you can't be everywhere at once. What you need is a disciplined process. It can't be too complicated, to ensure that everyone can follow it. That will allow for the same result repeatedly, following that same process.

It is crucial to have a disciplined environment. Otherwise, even if you have a standard, no one's going to follow it. If you have a culture of discipline, and then you're able to put standards in place, you'll get the return of a good quality product. The counterpoint to that is in order to increase it to create a disciplined environment, you need to have standards. This essentially means you need both standardization and discipline to progress with your employees, giving expectations to achieve and rules to follow.

2 **How have you seen technology evolve in your career related to process improvement?**

The first 10 years of my career came down to statistical process control. Going from handwritten x bar and R charts to something more computerized. Then, we progressed into something that would be more like Excel, so you could actually see it and get it into a spreadsheet so you could act upon it. Moving in that direction was a big transformative method to get it to see where quality could really improve over the last 10 years.

For the first 10 years of my career, we were competing with the Japanese and we were competing with German companies where it would become a multi country, global environment. And that's where a lot of the quality improvements happened in the first 10 years of my career.

And then after that, it became more complicated with the implementation of fast programs. Fast programs, meaning increasing the speed to market and technology was a huge help in getting products to market a lot faster. Before you were having a six-to-seven-year product cycle for automotive. And then we had to get down to four years. Now it's even shorter than that.

The biggest piece there for technology and communication was the enablement of the information engineer. At that point in time, it was a big transformative process. Now it's gone even further. It's really getting down to the to the actual operator or the builder, on a construction site where the individual operator has all of that information at their fingertips, so that their processes and their feedback can get instantly back into a database or the cloud.

That is where I see industry 4.0 with IoT and a lot of these emergent technologies coming together to give you instant feedback on what you're doing at that moment in time.

3 **What were the biggest challenges you faced working on building automation and optimization at Amazon?**

Time and money. They go hand in hand.

But the biggest thing is the time from certificate of occupancy, or when construction hands over the building, to start with the execution for the stuff that go into the building to the time where it actually goes into operation is only six weeks. It is a very fast-moving ballet of parts and people to get everything into that building and up and running. There is quite a bit of coordination that has to happen at least 20 weeks prior to what they call 'Day One.' And Day One obviously is the first day of operation.

There's the communication, the tracking, the risk mitigation—all of that has to happen well in advance to make sure that you are going to hit your target day. Clearly, they have all these employees that are going to start, and you really can't tell them the day before that' "Hey, we're not going to open today." You have to know that well in advance.
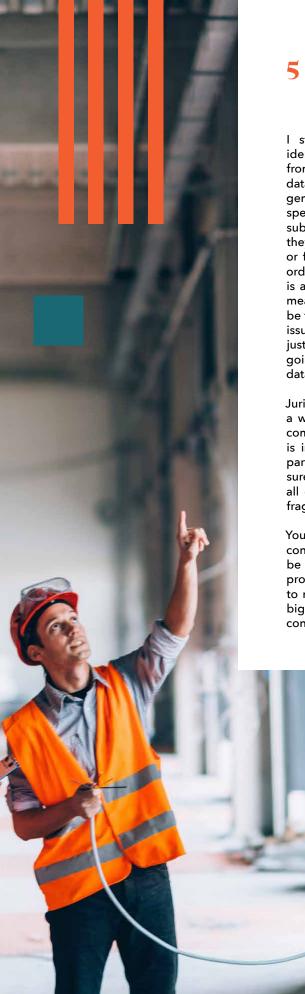
Anthony Offredi

4 **How did you overcome those challenges?**

At first, you start off by trying to put some discipline around the amount of paper that comes in. You have to start with the amount of paper that was coming in and the shared files—it was extreme. So, in the beginning, just understanding your deliverables and making sure that they were all categorized properly in the right locations was a challenge. That was the first part of the problem.

The second part of the problem was, how can we make this better? How can we alleviate the load off of these startup managers and these construction engineers that are out in the field? A lot of that led to 'why can't we just put it in the cloud?' And that's where I came in because I had previous experience with Quickbase. I understood that a lot of these forms, which were done in Excel and which were done in Word could easily be created and automated inside of Quickbase.

We made a priority list based off criticality and understood which ones we want to work on first and then worked our way down. And a very large list of standardized operating procedures for our department created a roadmap of which ones were going to be done by which day and then within six, seven months. We had critical mass of all the startup operating procedures done inside of Quickbase.

5 **What do you think is the most significant challenges that businesses in the built environment are contending with today?**

I still believe it's risk mitigation. It's identification of risk, and that comes from the hyper fragmentation of data. This come from the number of general contractors and time that is spent collecting and analyzing all the subcontractors' reports making sure that they're following either a quality checklist or following timelines. Making sure that orders for suppliers got placed on time is a huge issue. Let alone the weather, I mean, acts of God are always going to be there. But you can prevent a lot of the issues through early risk mitigation. It's just a question of how much time are you going to be allocating to putting all those data together and that's the biggest issue.

Jurisdictions and permits can always put a wrinkle in your plans, you never have complete clarity until the piece of paper is in your hand and signed. And that's part of risk mitigation. You want to make sure that those are all taken care of. But all of that really comes from that hyper fragmentation of data.

You need to have your electrical contractor done when he says is going to be done. And knowing that earlier in the program would be certainly beneficial to mitigating risks. And I see that as the biggest challenge right now for the construction industry.

6 **How do those challenges fall into your 'four Ps'?**

I would say people and parts—not having the right person on the job at the right time is a big issue. You don't have an early understanding if somebody is pre committed for another project. You need to have identification of that, so that you can make a change for your subcontractors.

Then, parts is the big one. Think about the steel industry. You need an understanding of where the support beams are coming from. If you'd have to change suppliers, you need to find a supplier early on for long lead items. And if they can't meet the timeline, and or identify that they can't meet the timeline, you're going to end up delaying your project. That was a big, big issue, and it still is a big issue.

The supply chain still hasn't fully recovered from COVID. I still think there's going to be a supply chain accordion effect over the next few years. Identifying those parts like roofing materials, you would have never thought that roofing materials could delay a project. That is one of the things that we were able to mitigate early on because we identified it earlier on in the process. You're going to talk to your roofer, and if you don't have that constant communication chain set up, you're not going to be able to mitigate your risk earlier.

For the full conversation and more insight from Anthony, check out the full podcast.

quickbase.com

How Gray Work is **Dragging Down** Your Business

70%

of employees spend 20+ hoursa week chasing information instead of doing their job.

Empower 2023 was full of insights on the future of work, the way we accomplish our projects, and how to get more out of our teams and systems. One theme that resonated with the attendees most heavily was that theme of gray work. Gray work is the ad-hoc workarounds and solutions you create to make do or get by when your software doesn't keep pace with the ever-changing world we work in.

"Gray work is the slow, manual way you "get by" every day because your technology doesn't work for you," said CEO Ed Jennings during his Empower keynote session.

Let's delve more into what Ed shared about gray work and why it's such a challenge – and how organizations are pushing back.

Why is work so hard?

Three major trends are converging to make work harder than ever – and causing this growth in gray work.

First, we have more information at our fingertips than ever – but it's only causing information overload. With the amount of information available, we are struggling to keep it organized and actionable. Our recent research report, Roadblocks to the Dynamic Enterprise, found that almost 70% people are spending upwards of 20 hours per week chasing information from different technologies instead of actually focusing on the key projects that drive revenue.

Beyond this, our workforce is increasingly tech-savvy, but organizations are yet to take advantage of this. When technology solutions are stuck in IT's hands, the potential of our workforces is being squandered. In fact, our research found that 45% of respondents find their software solutions neutral or negative for productivity.

Finally, there is an explosion of workplace tools. CRMs, ERPs, collaboration tools, point solutions for individual tasks…it's becoming untenable. **Our survey respondents collectively use 77 different platforms to accomplish their work.**

Gray work's entry

People are taking it upon themselves to fill the gaps that these tools are leaving. Enter gray work. Gray work is the work that people take on to get around the systems and tools that are coming up short. It is work done in manual spreadsheets, offline systems, and customized solutions from people who are trying to get their work done.

"A lot of end users have no idea how much gray work is involved in bringing them a solution," shared Ann Swelgin, Business Application Developer for Grantworks at Empower.

When work becomes more complex, solutions such as collaborative work management tools simply don't scale to be up for the task, and other solutions like low-code development platforms become too time-consuming to adapt to rapid changes. And when teams grow, work becomes more complex as well. And consider when assets are both physical and digital – work becomes harder and more important to keep track of, while gray work becomes a total drag on productivity, delaying projects and driving work over budget.

What to do to solve gray work

Pushing back against gray work means finding a way to see, connect, and control your most complex projects. The future comes when you can easily get the right information at the right time across devices and locations, manage your physical and digital resources effectively, and easily orchestrate your complex projects and custom processes across your organization.

For organizations seeking to remove gray work from their processes, they should seek out a platform purpose-built for the dynamic work of today.

"Quickbase is purpose-built to empower your Dynamic Enterprise – giving you a way to see, connect, and control your most complex work," Ed added.

Becoming a dynamic enterprise is how organizations will find success in the era of dynamic work, and the need to better accomplish the complex projects of today.

"All Together Now is our tagline because we believe we offer the missing platform to unify the fragmented data, systems and people across businesses today," Ed shared. "You have an opportunity to go in a different direction. And it's here – right now - that you build massive advantage."

The Invisible Impact of Gray Work

What lies beneath the surface of the modern way we work?

Over 1,000 technology leaders shared thoughts on their current state of work and how standard technology solutions don't support the dynamic way teams need to work:in real- time, across functions, in highly complex data environments.
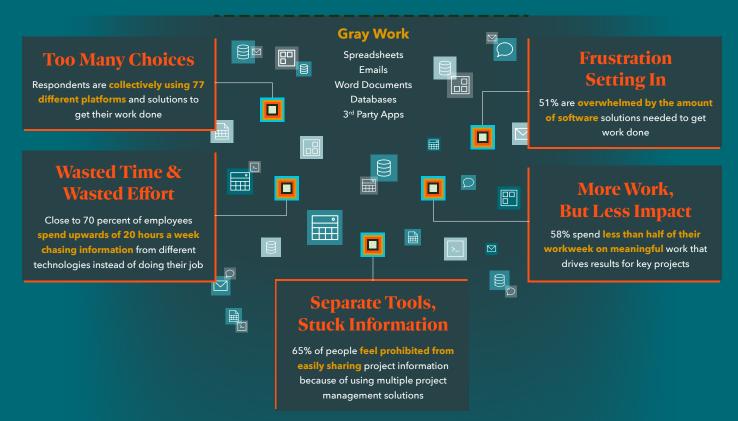
This leads to "gray work," the slow, manual way our teams get by because their technology doesn't work for them. It bogs down your people, makes work harder, and impacts revenue.

The standard tools we are given

Systems of Record
CRM · ORACLE · monday.com · workday. · servicenow · ERP · salesforce · Microsoft · LOB Point Solutions · SAP

Collaboration Tools
Project Manager · smartsheet · Workflow Manager · monday.com · Adobe Workfront · asana · BI & Analytics · wrike · Messaging & Communication · ATLASSIAN · Microsoft

Point Solutions
Site Selection · CoStar · Quality Control · Safety Management · SIEMENS · YARDI · BIM · Sage · Supply Chain · PlanGrid · appfolio · PROCORE · Lifecycle Management

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Gray Work
Spreadsheets
Emails
Word Documents
Databases
3rd Party Apps

Too Many Choices
Respondents are **collectively using 77 different platforms** and solutions to get their work done

Frustration Setting In
51% are **overwhelmed by the amount of software** solutions needed to get work done

Wasted Time & Wasted Effort
Close to 70 percent of employees **spend upwards of 20 hours a week chasing information** from different technologies instead of doing their job

More Work, But Less Impact
58% spend **less than half of their workweek on meaningful** work that drives results for key projects

Separate Tools, Stuck Information
65% of people **feel prohibited from easily sharing** project information because of using multiple project management solutions

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Transforming Business with Dynamic Technology

Building a Central System, One App at a Time

Headquartered in Ireland, LCI is a leading aviation company that is uniquely positioned across the commercial fixed-wing, helicopter, and advanced air mobility sectors. It provides leasing services to airlines, helicopter operators, Governments, and end-users and has undertaken more than $10B in aviation transactions since its inception in 2004. Such a consistent growth trajectory requires a team steadfast in its business goals.

Monica Butfoy, the team's Technical Manager, manages the company's aircraft and engineering operations. LCI's technical team ensures that all aspects of aircraft management like maintenance, inspection, delivery, and retrieval happen efficiently and effectively. These business-critical processes involve an extensive list of tasks and processes to complete.

To help manage their data, LCI teamed up with Jetstar partners in 2015. The Quickbase custom-built solution, Jetbase, met all of the LCI requirements and allowed the company to track aircraft management, lease management, utilization, maintenance reserves and much more.

As LCI's business grew, it became an increasing challenge to keep track of all company projects with their existing apps. Monica was able to implement processes and procedures for better project management, without needing technical skills to do so – solving multiple business challenges along the way.

> As LCI's business grew, it became an increasing challenge to keep track of all company projects with their existing apps.

Crafting a Complete Project Management and Business Operations Solution

Due to the specialist aircraft leasing and management sector in which LCI operates, a comprehensive, out-of-the-box solution does not readily exist.

Once she began training with Jetstar, Monica realized that Quickbase could solve many of the industry-specific challenges the business was contending with by leveraging custom workflows.

At LCI there are as many as 30 to 40 projects in-flight each week. Managing an aircraft fleet means tracking movement to delivery, repossession, refinancing, plus client onboarding. This constant influx of work requires every department to complete its tasks before the next phase can begin. Making operations simpler was a necessity, and this meant finding a single system that could handle all tasks and centralize them.

With this understanding, Monica and the wider LCI team built their company's project management app, and a CRM (customer relationship management) & Prospect management app where the company can organize and manage each potential prospect from that initial stage through to the live project stage. The apps are now a one-stop shop for all LCI company projects and include detailed prospect & project lists, terms for contract management, cost tracking, budgeting, specific task lists, customer database, and more. Prior to the application's creation and adoption, everything was monitored via Excel. The move has simplified operations and ensures that each project can be tracked with an assigned deal team.

In addition to the project management and CRM apps, she created solutions for simple, previously disconnected business processes to get employees comfortable with using Quickbase. Processes like keeping track of employee leave application and approvals, which was previously tracked on excel, moved to a Quickbase application.

Capturing business-critical but simple solutions led to her colleagues becoming more comfortable using the application. This triggered an increase in usage for the organization, improving their productivity. Monica's focus on engaging the team has taken Quickbase from an underutilized software to one in which "most people log in at least every 24 hours."

At LCI there are as many as 30 to 40 projects in-flight each week. Managing an aircraft fleet means tracking movement to delivery, repossession, refinancing, plus client onboarding.

Creating a Single Source of Truth, One App at a Time

Adopting Quickbase has streamlined the way LCI tracks important business information.

The growing number of applications built on Quickbase in the organization has:

- Automated project handoffs between teams with the click of a button

- Eliminated duplicate & and information

- Provided data in real-time to make better business decisions

- Made onboarding employees & clients easier

For the past six years, Monica and her colleagues have made their Quickbase system more user-friendly by creating team-specific apps and making it easy (and necessary) to access them. Quickbase is now the home of day-to-day operations for LCI's aircraft & lease data management, HR, CRM and prospect management, project management, and more. The ability to customize each dashboard, be it for the project management team or Marketing team, is what Monica loves most about the easy to evolve platform.

"If somebody comes to me and says, 'I don't like the look of it' or 'can we add new fields?'" Monica replies, "No problem let's get it done!"
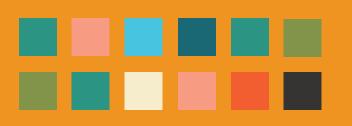
Quickbase become a business-critical platform that every member of the business logs into at least once every day. The team's work has not only taken the company out of spreadsheets, but also facilitated further creativity and innovation from many teams within the company.

The way Quickbase has evolved LCI's operations is clearly reflected in the work of Monica Butfoy and the wider LCI team.

"I love delving into what each team needs and figuring out how we can help them by adding apps and allowing people to reduce workload through better process and procedure," Monica says. "Quickbase apps give us the ability to assist with this, and we are now also exploring its AI capabilities and how we can integrate them into our platform."give us the ability to assist with this, and we are now also exploring its AI capabilities and how we can integrate them into our platform."

Powering a Mobile Retail Experience Transformation

You cannot grow to be one of the largest telecommunications companies in the world and a member of the Fortune 250 without a commitment to innovation through a robust portfolio of brands.

As a company that provides lightning-fast connections for its customers, this telecom enterprise also needs access to real-time data to make impactful decisions for their business. **With numerous brands under its umbrella and over 15,000 employees, it is imperative initiatives are streamlined and crucial data is centralized.**

Among their portfolio is a recently acquired mobile carrier who, over the last five years, has been implementing a refreshed retail experience for their customers. With over 5,000 retail locations across the U.S. this massive project was set in motion to outfit stores with updated graphics, optimized layouts, and new fixtures.

"We really wanted to up the retail experience," says the brand's leader of real estate operations and technology.

Managing such a complex project requires a solution that can be flexible, integrated with numerous other technologies, and serve as a central source of truth.

After relying on painstaking manual processes at the beginning of the initiative, the team turned to Quickbase to eliminate wasted time and improve the system for retail stores vying for upgrades.

Implementing such an ambitious plan came with a huge set of challenges including:

- Connecting dozens of stakeholders & locations spread across the country

- Consolidating numerous data sources

- Creating a standard process to follow

- Integrating different technologies

> **With over 5,000 retail locations across the U.S. this massive project was set in motion to outfit stores with updated graphics, optimized layouts, and new fixtures.**

From End User of a Frustrating Process to Manager of an Efficient Operation

Prior to taking a leadership role within real estate operations and technology, this business leader worked in the field supporting retail stores and was an end-user of the retail refresh process.

For a store to receive the upgrades, the location submits an application to be reviewed by a central committee. The committee takes into consideration a store's real estate profile, its location relative to target demographics, overall performance and potential ROI for new store outfitting.

At the beginning of the refresh initiative, the committee was small, and most of the process was being handled with spreadsheets and emails.

When a new site wanted to submit to the committee for review, they would need to fill out information in an Excel spreadsheet and either email the information or attach it to a record in Salesforce.

"If someone forgot to check a box, or update a cell on the spreadsheet, I would be the one chasing things down. There were times I had already submitted something but somewhere in the process it got lost, leading to repeated work and slowing down our progress," they explain.

"With the number of locations we were opening at that time, it was almost a full-time job just to track where everything was in the real estate process."

Very quickly stakeholders realized they needed a better system to capture all the data being submitted, integrate various technologies, and act as an end-to-end workflow management tool.

The team at the mobile carrier went through a process of identifying potential solutions and found:

- Traditional development would be too costly and time-intensive

- There was a huge desire for ease-of-use for users

- The solution would need to be flexible and handle changing needs

With the number of locations we were opening at that time, it was almost a full-time job just to track where everything was in the real estate process.

quickbase.com

After clarifying their requirements, the team settled on Quickbase as their choice. Quickbase would give them the user-friendliness, flexibility, and accessibility they needed, the manager says.

"Quickbase gave us the ability to very quickly get ourselves up and running without having to wait on a very long turnaround because it's so user-friendly from a development standpoint."

A Quickbase application turned the retail refresh project from being driven manually to smooth automation. "Before Quickbase, everything about our tracking process was difficult. It was especially difficult to have that holistic overview of all of our sites where they were in the process," they point out.

"The Quickbase application has just been huge for us. We now have a system to manage the process. Our workforce can submit their information and be confident that it will get where it needs to go."

The real estate ops team now has a central source of truth for everything relating to their retail locations. When new information is submitted it comes with a date and time stamp plus the person submitting it for easier tracking.

"There are a lot of processes to manage, and a lot of different pieces within those processes. Without having a solution like Quickbase, we just wouldn't be able to do it."

The team continued to leverage Quickbase to improve this process. They added the ability to prospect new retail locations, without the need for a manual checklist.

"They can just do everything straight from the mobile application while they're on site. It has saved a lot of time and energy. They have everything right at their fingertips. Users can take pictures and upload them immediately or come back and work on it later before sending it for final review."

With the Quickbase application fully embedded, the refresh initiative continues to transform the retail experience for their customers.

quickbase.com

Why Big Projects Fail, Sometimes Spectacularly

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Don't just expect your big projects to fail. Expect them to fail spectacularly.

Bent Flyvbjerg

Bent Flyvbjerg knows a thing or two about project inefficiency. As an Oxford University professor and economic geographer, Flyvbjerg studies the role that big projects play in shaping and changing cities – and why so many of those projects run over budget, over time, or simply fail.

Flyvbjerg's consulted on more than 100 megaprojects (extremely large-scale, complex operations) each costing at least $1 billion. He's also collected data on more than 16,000 projects across the globe, ranging from a multi-school development in Nepal to The Guggenheim Bilbao Museum. All together, his research paints a bleak picture. Less than 50 percent of megaprojects come in on budget. Only 9 percent come in on budget and on time. And less than 1 percent come in on budget, on time and deliver expected benefits.

In other words:
99.5% of big projects fail in one way or another.

In his latest book, **How Big Things Get Done,** Flyvbjerg and co-author Dan Gardner use those failures, and some rare wins, to construct a blueprint for success. Flyvbjerg recently spoke with Quickbase about what distinguishes triumphs from defeats, even – and especially – as inflation and rising interest rates drive up costs for big projects, the productivity crisis continues and bad outcomes may seem inevitable.

You've said that we shouldn't expect projects to just go bad, but disastrously bad. Why is that?

Projects that cost too much, take too long and fail to deliver benefits are to be expected. But given the size, complexity and novelty of megaprojects, you shouldn't just expect them to go bad. You should expect quite a large percentage to go disastrously bad: black swan events with extreme blowouts for cost and schedule overruns. Like the Sydney Opera House, which was such a mess that entire sections had to be dynamited and rebuilt. The final tab was 1,400 percent over budget, and a decade late. Japan's Monju Nuclear Power Plant cost $9 billion, and was decommissioned after working for 250 days into its 22-year lifespan. No benefit at all to show: just costs and delays, and more costs and more delays.

What's the most common risk you see in big projects?

Project managers tend to think of risks as external. But the main threat to success is humans, and our cognitive biases. That includes optimism. Project managers are overly optimistic about budgets, schedules and even project benefits. They go in clueless about the real odds and end up underperforming on all three counts. And then they do the same thing again with the next project.

It's important to realize that we all have these types of biases. Then, we need to de-bias. Successful project leaders are always realistic. They have productive, instead of deluded, optimism.

You tell leaders to think slow, but act fast. How so?

Another bias that can crush a project is the urge to jump in and get those shovels in the ground as fast as possible. But planning needs to include experimentation, trial and error, and plenty of iterating.

Planning is doing. It's a crucial part of many successful projects we've studied. Pixar Animation Studios has an established process that includes various iterations of a film, with room and time for experimenting and adjusting along the way. Award-winning architect Frank Gehry is famous for creating hundreds of iterations and digital simulations before arriving at the final design.

Why should we all "find our Lego"?

A block of Lego is a small thing, but with enough of them you can create something much bigger. Every project leader should begin by asking, "What's our Lego? What's our small thing we can repeat, repeat, repeat?"

Modularity is the key to megaprojects that tend to succeed. A megaproject in Nepal produced 20,000 schools this way, on budget and years ahead of schedule. It began with designing three classrooms for different conditions. Multiple classrooms became a school. Schools became districts. Districts became a school system.

Solar panels, wind farms, server farms, software, Apple's headquarters, the Madrid Metro system: all are based on repeat, repeat, repeat.

Looking ahead, will the current economic situation dry up the number of big projects?

Inflation and higher interest rates are making everything harder and more expensive. Some builders hesitate to take on the risk of rising costs. But the project pipeline is not likely to dry up. During a crisis, big projects are used as stimulus.

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