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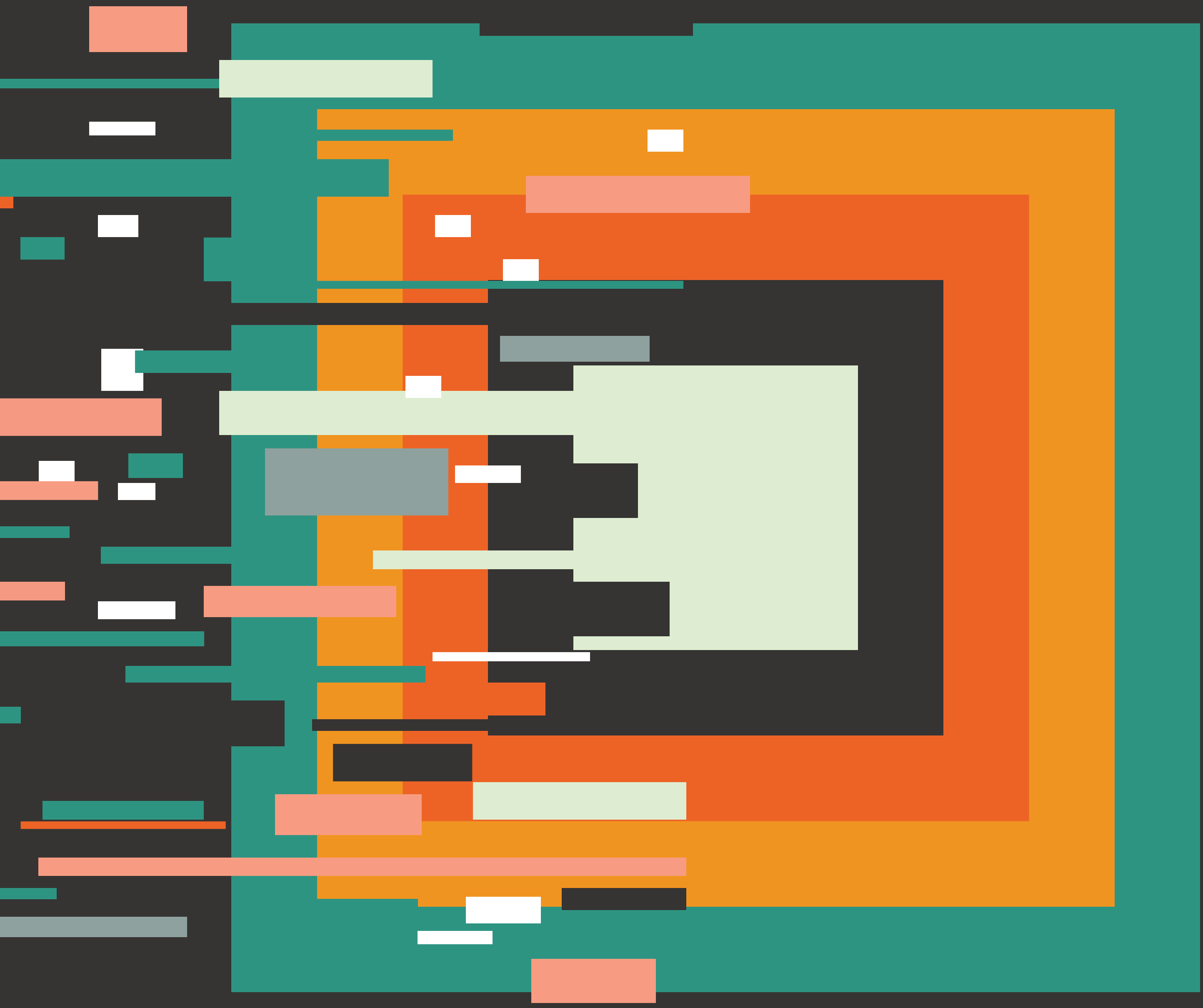

## Abate fragmentation

Spring 2023

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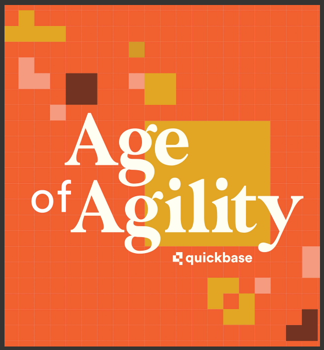



Don't just hear from industry leaders, learn from them. Join us and our episode guests as we discuss some of the struggles and successes that come along with solving complex business challenges.

Listen now!

# Contents

# Doesn't work feel harder than ever?

We've seen teams scattered all over the world, economic pressures, continued supply chain shortages – all forcing us to try and do more with less. This is weighing on us – and it's really hard and really complex.

Think about what makes your work hard – it's the big, time-sensitive projects, it's teams across locations and out in the field, it's your key materials all over the place, and data stuck in systems where you can't access it.

We hear this all the time. In fact, the Wall Street Journal recently shared research conducted over 30 years that showed that 99% of megaprojects – buildings and bridges and large data centers – fail in some way. Further, less than half come in on budget, and only 8.5% come in on time and on budget.

## So what's behind this trend?

Businesses today have access to more data than ever before. There's data from digital channels, connected devices, and physical assets. And storing and analyzing this vast amount of information is getting easier and cheaper.

But here's the thing - even though we have all this amazing data at our fingertips, it often lives in silos. Most businesses still don't know how to use that data effectively, because there is no connection to it. Our recent research at Quickbase found that teams use an average of 7 different tools to do work. So, it's no surprise that most businesses today are disconnected and highly fragmented. This makes collaboration at scale nearly impossible.

And unfortunately, the solutions available in the market today don't quite get the job done. Spreadsheets are a nightmare. Collaborative Work Management tools solve some of this fragmentation, but they're not designed for complexity. And developer platforms take specialized skillsets and way too long to implement.

Quickbase bridges that gap for a lot of our customers. It is robust enough for complexity but flexible enough to help them move quickly at scale. Our goal is to help you see, connect and control your most complex projects. And ultimately, as you'll find throughout this magazine, our mission is to make complex work simple.

# Community Perspectives

*Projects are more complex because of challenges in obtaining and analyzing multiple data sources, limited time and resources.*

Brian Hinshaw, Principal Business Manager at AT&T on the cause of work complexity today

*We now have greater expectations to have data more available for reporting purposes across all the platforms we use. Companies we work with have changed a lot of their processes since COVID hit, so we've had to shift over to even more integrations to ensure the teams have the data they need to keep above the heavy volume of new work flowing into our door.*

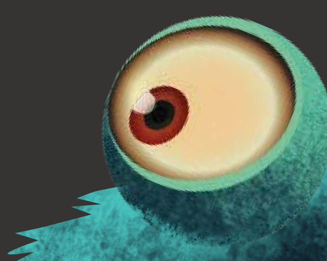
Mark Lind, Systems Analyst, CCI Systems, Inc. on how expectations for data availability have shifted

*Once data sources are brought together, data can be sliced and diced in new ways. As we are looking at data in new ways, the team begins formulating new questions which lead to new requirements for how to look at the data.*

Adam Keever, Advanced Quality/ Warranty Engineer at Magna on overcoming complexity and innovating through data

*You need to work more collaboratively. You must build relationships. It's an action regardless of any tool. Projects are different now. There's always a remote component, and it's important to focus on the business value.*

Deb Cote, Sr. Director, Strategic Planning & Performance at Dana-Farber Cancer Institute on tackling complex projects with collaboration



# Unlocking the Real Estate and Workplace Effectiveness Connection
# 5 Questions with Sara Andersen

**On the heels of a complete transformation in how work gets done, leading organizations across the globe are grappling with how their office space functions and how their employees can be most productive and engaged. At the intersection of the design of physical space and workplace effectiveness initiatives you'll find Sara Andersen, Head of Real Estate and Workplace Effectiveness at Genentech.**

Andersen's expertise in design and aptitude for solving complex problems is exemplified in her leadership of biotech company, Genentech, and their diverse set of real estate and workplace needs. Andersen's experience guiding the organization through safe operations in the midst of pandemic response and return to work procedures or hybrid teams can be lesson to any company examining how they can create or reengineer safer and more productive physical spaces within their real estate footprint.

**Here are 5 questions from a recent podcast appearance that any business leader can take to optimize their real estate space for employee experience and workplace effectiveness.**

**Q. When you're approaching making workplace effectiveness improvements organizationally, what does it take to make sure everyone's needs are being fulfilled?**

I'm not gonna say negotiation. I would say, really good human skills. You know, are we aligned? What are you really trying to achieve? When you talk about what we're trying to achieve as a business? It allows us to objectify the process. It's less about, 'well, I want to be on the top floor because of us are better.' What are we trying to achieve as a business?

I love what our company does. I've got the luxury of working for a company that saves lives. And it's actually really wonderful because it's very easy to reconnect people to the mission.

For example, years ago, I received a ping from an administrative assistant. She said, "My VP needs a sit-stand in her inner office, and it was rejected by your team." I was like, Oh, that's interesting. Okay. Do you mind if I speak with the VP? Turns out the VP had just joined us from an edtech company where they didn't have assigned offices. She didn't love being in an office. And I said, Okay, and the reason we said no was because your admin was looking at a very customized situation.

We try not to customize, because we spend three to $5 million a year customizing offices, and then when you move to another role, we'll spend another three to $5 million that year to put it back to standard. $5 million funds 1 to 2 clinical trials. How do we want to spend that money? And she's like, 'I am so with you. Frankly, can you come speak to my entire staff and just give them that stat?' I was like, yeah, no problem. So, I recognize that that's the gift that we have. We are so mission driven, that we can connect people to the mission and make sure we're spending funds wisely.

**Q. When you consider what "success" means for your real estate footprint and workplace efficiency, what measure would you say sits in the middle and means both things are operating well?**

Well, one thing I want to clarify, we think about workplace effectiveness, not efficient. It's important because in all of our conversations about why we want people to come together on campus, the utilization of our real estate has never been a focus at all. Not that we want to be irresponsible with it or anything like that. But our head of R&D said something impactful, I felt. A lot of us at home felt like we were being really productive, and we talk about that a lot as an industry—how productive we've all been at home. So, are we when we are working from home? Are we productive because we have a list of things that we want to accomplish, and we get everything done on that list? Is that productive or just efficient? And efficiency has no place in innovation.

You're probably familiar with the theory of weak ties and strong ties. During work from home period, we're working with a lot of the same people, those are strong ties. Our strong ties got stronger. The majority of our weak ties withered. Innovation comes from our weak ties and diversity of thoughts.

So, in talks about our real estate and our workplace, how do we make sure that there's buzz? How do we make sure that we're getting enough mass? What's it like to have a presence that you got some buzzy feel? You want people to feel like, frankly. It was a positive experience coming to campus today. We want people to have experiences when they come to campus that they can't have at home- On lunch with colleagues, seeing people, a spark a new idea.

**Q. What did you find to be effective in making the workplace more productive and incentivizing bringing people back into the office through the pandemic?**

When we had to go into shelter in place, our manufacturing teams never left. So, all of a sudden, we need to be sure we're supporting them with safe work environments, social distancing, and masking while you're on the manufacturing floor. Not all tasks allow for that. So really have a great deal of respect for business continuity teams. They kept everything going we can make in the drugs. But then we also had the pressure of getting our scientists back and back safely. I would say that for the majority of the end of 2020 and all of 2021, we were really very focused on the changing environmental conditions and keeping those who needed to be on campus safe.

We also recognized early days, I want to say it was April of 2020, that not everybody can work from home successfully. You may have a lot of roommates. You may have multiple kids. Whatever it is. So, we had a lease facility, about 10 minutes away from campus that already had shared work environments, and we opened that up as a drop in for those who needed it. That was really helpful for a lot of people, and we were able to sort of keep those who didn't have to be on campus away from those who had to be on campus, because it was really all about safety.

Then in May of 2021, we opened up a voluntary return to campus and our executive committee was the first group to come, and we did one building that was shared. We did it for two reasons. One, it was a large facility that was all shared. And two, we wanted everybody who's returning voluntarily to be in the same place to create a buzz. Then, we had our return to campus in March of '22.

**Q. What changes came out of the rapid change to your workspace?**

We started talking with the executive committee. What does the future of working really look like? This conversation started April 2020. So, we spent all of '21 developing future of working agreements with every functional group—the where, when and how you do your work.

What are all the different work options available to you? Is your role a full-time campus role? Is your role a role that can be ad-hoc remote a couple days a week? Is your role something that's eligible to be episodic remote for up to four weeks at a time with agreement? Can you job share?

We were trying to be really explicit, because we've always had agreements around how you operate in the shared work environment, how you want to operate as a team, but really making it much more explicit about the where, when, and how and what roles are eligible for what. But we did all that while a lot of us were home. So in March '22, we started coming back, and we're like, 'Huh, no more people are here.' Even though we called it ad-hoc remote, meaning campus-first, people started treating it as ad hoc campus. So, why should I go to campus versus campuses the default.

There were growing pains. We're getting better revisiting our agreements. We agree that we want you on campus the majority of your time. You, as a business unit, can determine whether majority is per month or is per week. And then some groups have a very good practice of anchor days, so you are making sure that you're seeing the people you want to see.

**Q. What do you think is something that most organizations get wrong about making the workplace more effective?**

I think the connection to the business and the co-creation with a business. Manufacturing furniture for offices is a very large industry, and they'll say, "If you want your people to come back, you need to have this!" Whatever this is. But you need to go meet with a business unit.

**For the full conversation and more insight from Sara, check out the podcast:**


# Brick-&-Mortar is not Obsolete:

*How the Retail Industry has been Redefined*

In recent years, retailers have observed a shift in consumer behavior related to increased online shopping. Quickbase, a no-code software provider and Dynata, a research company, conducted a survey of 1,000 U.S.-based adults to gather insight on consumers' buying habits. The survey aimed to determine what makes shoppers visit a retail space in-person versus buy online.

Inside the report are several key findings: of the survey respondents, 49% stated that they shopped more online, and 51% stated they shopped more in-store; over the past year, 41% of respondents said their online shopping increased, compared to the 16% who said their in-store shopping increased; superstores/discount department stores and supermarkets/grocery stores were ranked highest for which brick-and-mortar stores respondents frequented the most.

What do these report findings mean? They indicate that retailers with physical stores must ensure a customer's in-person experience will be worth their time. To convince customers that in-store shopping is the better option, retailers need to understand how consumers use, think, and experience a product.
Beyond the product, retailers must determine what consumers are looking to gain when they shop in-store rather than online. Is it the reliability of purchasing something directly versus waiting for it in the mail? Is it the convenience of knowing how the inventory is organized, eliminating the hassle that might come with trying to order from a confusing online store?

Or is it the availability of different locations in-store versus a single source online? Whatever the customer's justification for shopping in person, retailers must be able to provide a seamless customer experience. Knowledgeable staff, reliable products, and an organized, easy-to-use system can help retailers stay in business despite a growing preference for online shopping.

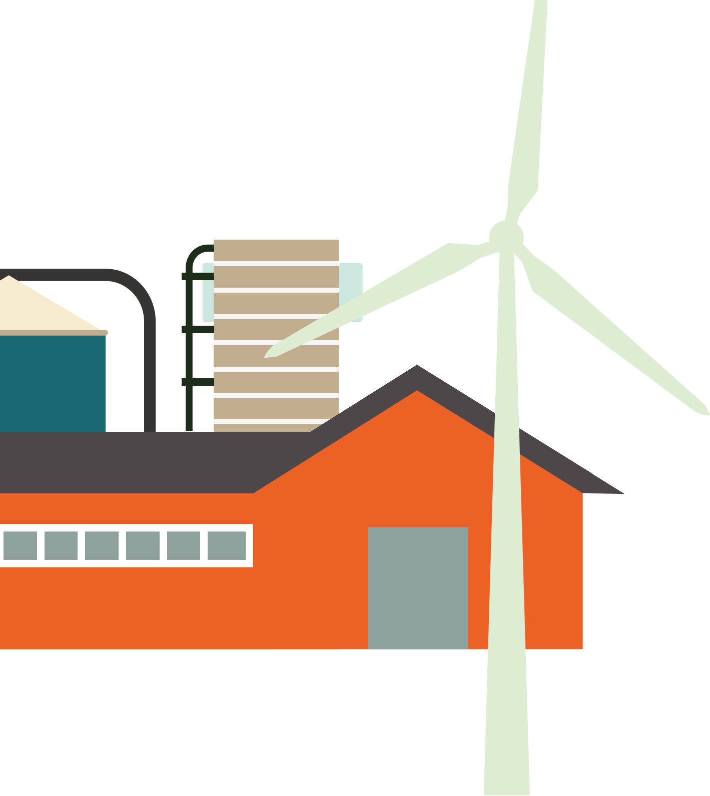
## How Can Retailers Adjust for the Next Generation of Shoppers?

Shopping habits differ between generations, and as the younger generation joins the pool of potential customers, retail companies must adapt to the consumer's changing mindset.

## Inventory

When comparing responses between generations of shoppers in the report, Millennials (those born between around 1981 to 1996) felt the strongest about inventory levels/availability as their motivating factor to visit a store in person. Young shoppers want to be confident in inventory levels when they're shopping at a brick-and-mortar establishment. Convenience and familiarity encourage them to come back.

When retailers use tech solutions to organize and regulate inventory, they can provide that expected convenience for Millennials and other shoppers. Up-to-date inventory also means customers who check online first to see if a certain product is available in-store can come in and buy what they need without being disappointed if the product is actually out of stock. Inventory must be updated in real time to build the customer's trust in a company with every visit to one of their stores.



## What do shoppers want to do in-person? Buy groceries.

Brick-and-mortar superstores/discount department stores and supermarkets/grocery stores were ranked the first and second most frequented stores, respectively. Of the respondents, 29% said they would be least likely to purchase groceries online. The motivating factors that drove individuals to shop in-store were location and availability/inventory levels.

## How many people are moving from in-store to online or vice versa?

According to the study results, 41% of respondents said their online shopping increased, while only 16% said their in-store shopping increased in the past year. The motivating factors that drove individuals to shop in-store were location and availability/inventory levels.

While online shopping has become more popular recently, both online and brick-and-mortar stores need to adapt to fit the needs of consumers. Through innovation, retail companies can provide a better shopping experience, whether it's an employee app that tracks inventory in real time for in-store shoppers or a general online marketplace (E.g. Amazon, Rakuten) that allows customers to buy from different vendors at the same time.

## Sustainability

Besides inventory, sustainability is a higher priority for younger generations. Among Millennials, 78% ranked sustainability as their number one factor in deciding whether or not to buy from a certain company, compared to only 16% of Baby Boomers.

Gen Z (those born in the mid-to-late 1990s and early 2010s) are demanding sustainable retail, too, with 60% of respondents ranking sustainability as their number one deciding factor. Prior to making purchase decisions, they actively look for a store's sustainable initiatives such as non-toxic, vegan, and fair-trade products.

In response, retail companies need to carry products that meet these standards and certifications. The younger clientele wants to hold retail companies accountable, and companies must show that their sustainability efforts are sincere.

## Consumers are Looking for a Multi-Channel Experience Both In-Store and Online

Multi-channel shopping is when companies offer customers different ways to purchase products—on a website, in-person, via mail order, on an app, etc.

## Conclusion

Technology and data can also shape the company's product and process approach, allowing the company to perfect its business model and empower employees to deliver superb customer service—the bottom line. Without technology and innovation, retail companies can't keep up with evolving consumer demands either online or in-person.

The answer is to adopt technology that can be customized, enhanced, and tailored to consumer needs, and adapted to accommodate external factors like supply chain disruptions, economic fluctuations, and business trends.

# Digital Transformation's Fragmented Mess

Like many things today, work just feels more difficult than it used to be. The promise of technology and innovation has given way to bloated tech stacks.

An explosion of new software solutions, ushered in by digital transformation efforts over the past 5-10 years, has produced hyper fragmentation of data and information inside many organizations. This has created massive inefficiency, leading to costly project delays, bad decision making, poor cross-team collaboration, and more. It has made companies rigid and incapable of responding quickly to macroeconomic shifts. Companies are floundering, trying to figure out how to shore up their operations just to survive the turbulent years ahead. In response, they continue to adopt more tech solutions, searching desperately for a silver bullet, all the while fragmenting their organization even more.

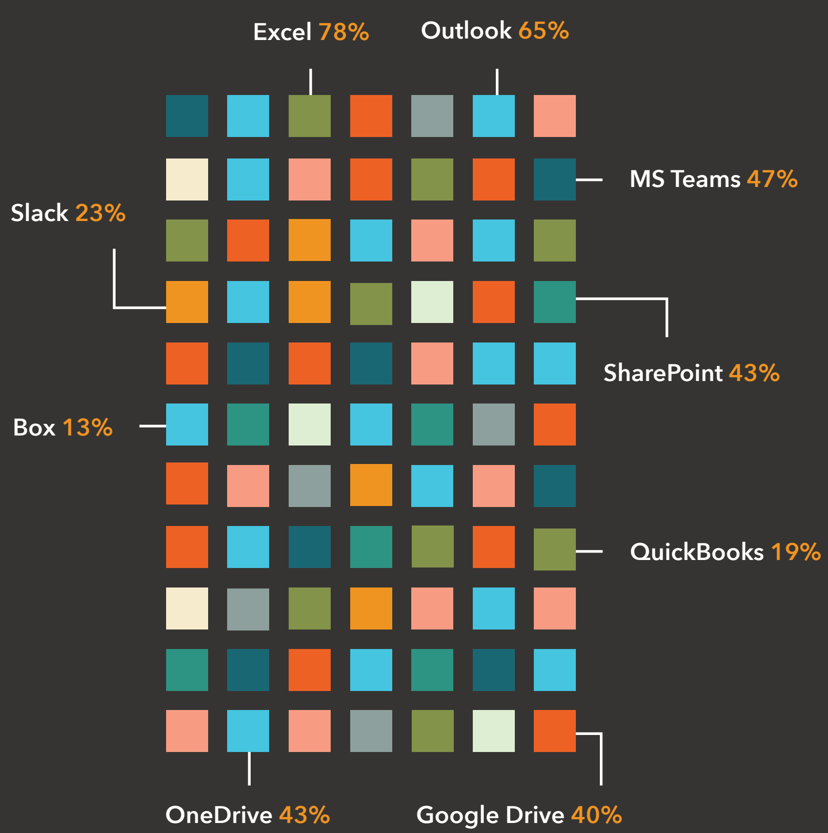
In an effort to understand how businesses are operating today and the pain they feel, we took to the market and conducted a study. Over 600 respondents answered a few simple questions in order to find out–How fragmented is your business data? The results reflected what we all feel. In the pursuit for digital transformation, everyone got lost in the hype.

**To address fragmentation though, you must first recognize where we are and how we got here.**

# 6.9

# platforms relied upon each week

## 77 different platforms were reported, but these stood out:




## How many systems do you rely on for information to get your work done each week?

At the heart of how fragmentation has run rampant is the volume of software platforms that we all rely on to work each day. Tools meant to improve our productivity and streamline work did so without making one another better. With each new problem needing to be addressed, a new software solution entered the fray. Each one of these creates its own set of data or has its own unique process tied to it.

Bouncing between more than a couple of applications makes many tasks convoluted and difficult. In fact, needing to juggle more than 6 applications puts businesses at a major risk for experiencing productivity problems due to information sprawl. **Our study found that respondents rely on an average of 6.9 platforms to get work done each week.**

This means that the average person has a tech stack that is too sprawling to be able to work effectively and rise to the level of productivity that today's work environment demands. It's not merely the number of tools that companies rely on that is overwhelming. The platforms relied on varied widely among the respondent pool. A total of 77 different software application s were listed by our group of respondents.

Of these 77 platforms, two listed more than any others have been hallmarks of the business tech toolkit for over two decades – **Excel (78%) and Outlook (65%).** Beyond these two programs, an instant communications platform was selected by nearly ¾ of respondents. MS Teams was reported on 47% of lists and Slack appeared on 23%.

After email, IM, and Excel, the next most common tools businesses rely on fell into three general categories: file sharing, task management, and CRM or accounting tools.

Cloud file sharing has become among the most important platforms businesses need in the hybrid work environment. This was borne out in our study results as OneDrive (43%), SharePoint (43%), Google Drive (40%), and Box (13%) were reported very commonly.

The most commonly reported accounting and CRM tools included QuickBooks (19%), Salesforce (17%), Oracle (13%), and SAP (12%).

This most common set of applications encompasses 18 selections, which leaves another 59 applications listed by our study respondents. Therein lies the problem. Each of these platforms is necessary for business operations to happen, but each one has its own unique set of processes and data associated with it. As different needs have risen, organizations have continued to adopt new tools without considering how sprawling and disconnected these systems are from one another. Thus, fragmentation is running wild within many businesses.

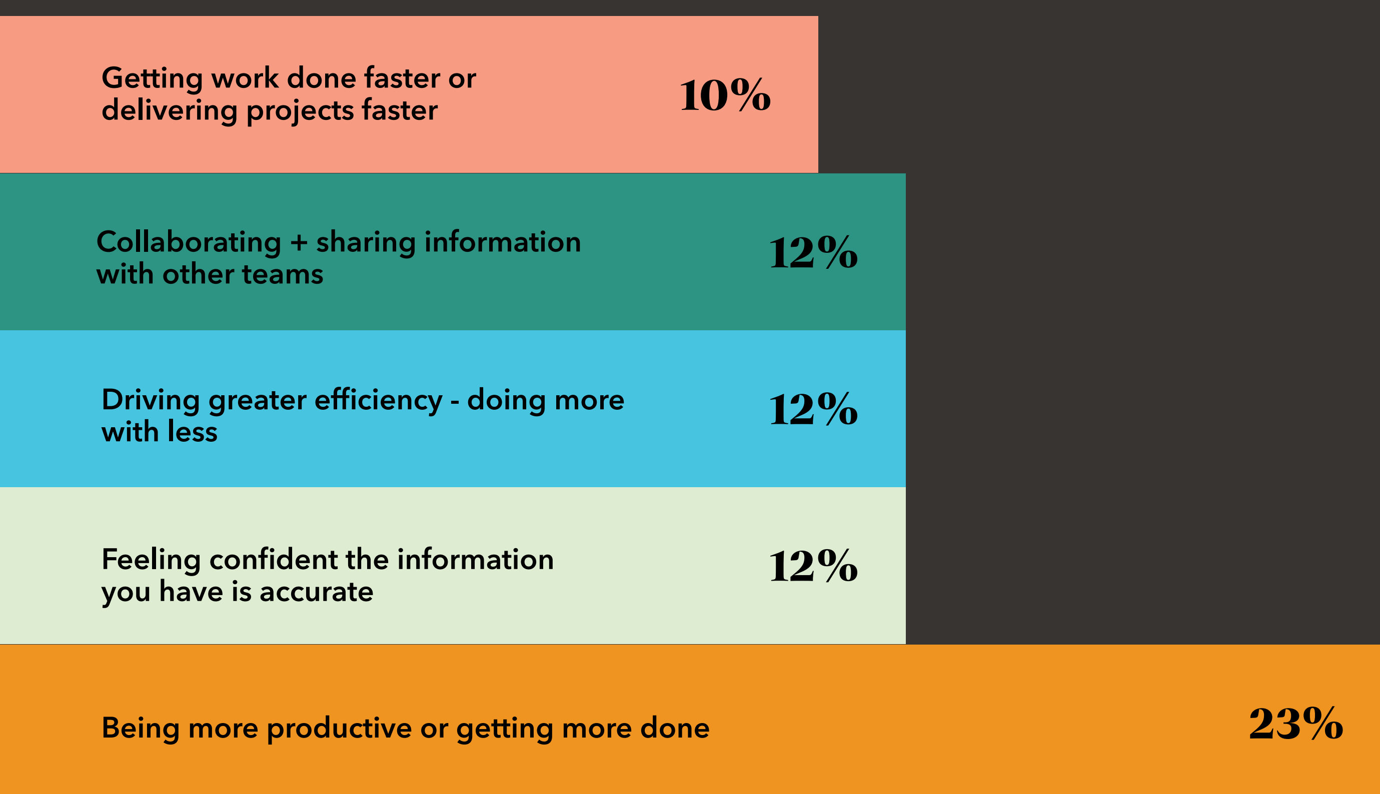
## What is the main struggle you are dealing with at your job?

How each person in an organization feels the strain of the current state of work can vary. External factors like inflation, workforce shortages, and supply chain disruptions create chaos more prominently for some businesses and professionals. Even if you don't feel that pressure directly though, the challenges resulting from poor internal systems and fragmented technology can present themselves very similarly. With that in mind, we asked our participants what they struggle with most at work.

A "productivity crisis" is often cited as a present challenge for many organizations. Almost ¼ of respondents agree and feel that is the most significant struggle they contend with. The next most prevalent struggle is a three-way tie between collaboration, efficiency, and trust. Just behind those three is speed.

Each of these struggles was meant to be solved by new technology. By blindly adopting new software though, these problems have been exacerbated for many people. Nearly all organizations employ a file sharing platform and communications software in their business, but information sharing and collaboration is still a challenge because processes may not be standard. Confidence in obtaining accurate information presents a challenge as multiple platforms for similar functions means never being sure whether information you're accessing is the most up-to-date available. The presence of a massive set of platforms has paralyzed productivity as teams are wasting time managing their tools instead of managing their work.

## The top 5 answers were:

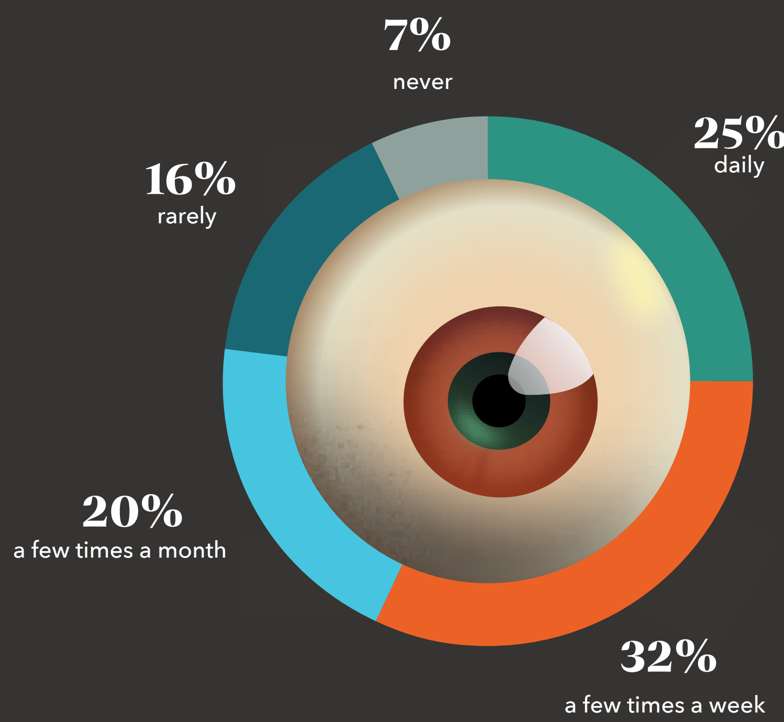


## How often are you or your organization affected by project delays, miscommunication, or duplicated work?

Fragmented data, communication, and workflows cut at the heart of all business functions. A whopping 57% of respondents to our study reported being held up by these issues more than once a week. A quarter of people experience these issues daily!

Finding that progress is being held up by internal confusion more than occasionally is a clear sign that fragmentation is crushing the productivity of your organization.

This result is particularly concerning in light of the rapid adoption of digital tools for business operations. Chances are if your business uses any brand of project management or productivity tool, they tout the ability to prevent delays and duplicated work. Unfortunately, too much software has created an environment where teams are either missing hand-offs or ignoring them. A lack of visibility is holding up progress for a majority of businesses, which is ultimately affecting the bottom line.





## Do you need to put the same data into different systems?

One of the most straightforward signs that the way you work is not really working is the frustrating task of entering the exact same piece of data in multiple places for different people. A staggering 68% of respondents to our fragmentation study find themselves entering duplicated data in multiple places.

This can be the result of a few different flavors of well-intentioned but poorly executed software adoption. From a lack of connection between systems to badly designed workflows to limited visibility for team members, manual re-entry of repeated data is a huge waste.

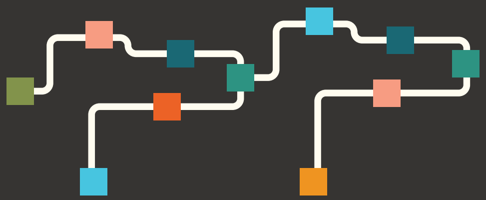
If you find yourself among that majority, it means you're not just wasting time by duplicating efforts, but you're also creating opportunities for typos and other errors to become larger issues for your organization. If insight is needed across teams, but those teams don't have the same visibility without duplicative action, you might be fragmented.

# Recommending a Solution

So, you get it. The problem that this explosion of business software has created for most organizations is very clear. Finding the solution may feel a little murky though. It seems counter-intuitive to say that more software is the route to solving for too much software. However, building more productive processes isn't just about the software you use. It's about focusing on how that software operates with how your business gets work done.

Prioritize Visibility

With increasing fragmentation, it is unclear who has access to which systems, how key processes are run and managed, and how teams can best do their work. To build an accurate view into how you work and your key projects, put visibility at the core of your strategy to minimize fragmentation. A major key to minimizing fragmentation is building and committing to a single source of truth for critical project information. That way, there is a trusted place for all information, and there is confidence that everyone can confidently know they have the most accurate data.



Build Connections

The fragmentation of systems doesn't mean that data and process aren't valuable. Each new software adopted over time intends to solve a problem, and chances are that they do! The problem is that fragmentation, by definition, is borne out of new software that lives on an island, siloed from your existing work. Building connections between your existing data and business systems is the next step you need to follow in order to overcome fragmentation.

Along with the explosion of new software, integrations between platforms have also boomed. While rigid systems have kept many workflows in the dark, a dedicated focus on connecting crucial data in a singular, easily accessible location is one of the most important steps you can take to keep fragmentation from derailing your business. Vet the capabilities of software in your tech stack with a focus on data integrations and dashboards.

Focusing on four key areas – **visibility, connection, automation, and collaboration** – can push back and halt the continued advances of hyper-fragmentation. Here's how you can stop fragmentation from continuing to plague your people and reverse the tides.

# Recommending a Solution

### Adopt Automation

The goal of any work management software is simple: make things easier. The single most effective way to reduce delays and make teams more productive is to automate tedious processes in your project workflows. It seems simple, but research from Foundry found that less than 40% of businesses automate project workflows. Buying new technology without a proper framework has forced organizations to spend hours mired in manual processes.

Adopting automation and building data connections go hand in hand, and the processes to achieve It are very similar. Establishing automated workflows takes a great deal of consideration and it is incumbent on technology leaders to understand how teams operate before setting forth the plan. Adopting automation is also an incredibly iterative process, so start by stacking easy wins like scheduling and task management. The adoption of customizable collaborative software is helpful in accelerating the steps from manual to fully automated.

### Facilitate Collaboration

Getting work done well requires collaboration and coordination – across teams, across systems, and across organizations. This comes from better communication, which can be driven by standardizing processes and boosting the visibility teams have into each other's work. Effective collaboration on a large-scale means uniting your key workflows and data to create seamless cross-team and cross-organization work.

# Finding a Way Forward

Call it whatever you want: data silos, disconnected processes, disparate systems, whatever. Every one of these jargony terms boils down to the same problem—the way companies work is too fragmented and crushing their productivity. Even though less than a quarter of our respondent group reported experiencing work delays either rarely or never, there is hope.

Many companies have found ways to control fragmentation in their tech stack by prioritizing visibility, connection, automation, and collaboration. As a result of more organizations recognizing how their current technology set-up is hampering their productivity, the broader productivity crisis is being exposed. Overcoming fragmentation means becoming flexible in the face of change, delivering projects on time and on budget, and reducing friction in managing your most complex work.

# Empowering Business Through Real Estate Data

Empowering Business Through Real Estate Data

# How Foodstuffs Manages a $3B Property Portfolio

Foodstuffs is the largest food retailer in New Zealand. With over 350 locations across various formats – including fuel stations, convenience stores and supermarkets – the company has a robust real estate footprint. The Foodstuffs team oversees a portfolio of $3B in property assets and $100MM in yearly spend on land, new stores, and refurbishments.

A large, diverse property portfolio means there are a lot of moving parts that go into planning, managing, and executing numerous projects. Maintaining visibility and control of all those different processes requires flexibility, strong data integrations, and robust reporting.

To meet their needs and keep all their projects running efficiently Foodstuffs relies on Quickbase. Using the no-code platform, the team has built an entire property portfolio ecosystem that can track progress across different job sites and provide in-depth reporting for every metric they need.

## Silos and no single source of truth led to costly delays

Steven Mitchell, Head of Store Design & Delivery at Foodstuffs North Island, is responsible for developing store formats, selecting building sites, overseeing construction of new stores, and maintaining existing stores.

To ensure the company's productivity and expansion goals are being met, he needs a lot of information – and it must be accurate and up to date.

Before Quickbase, Steven struggled to understand the status of various projects.

### "I would talk to five or six different people, and get five or six different answers," he says.

Those different answers came because there were at least five teams with their own different software platforms, network servers, and varying permissions. The lack of a central source of truth created silos within the company making it difficult to access critical data or ensure that it was accurate.

Because of the siloed departments and inability to quickly access real-time data, Steven and his teams saw projects suffering. Refurbishments of existing stores faced overspending and schedule delays. New stores had their completion dates delayed, crept over budget, and impacted the forecast retail sales income.

When an external capital efficiency review reported that **the organization was wasting up to 25 cents of every dollar spent on CapEx,** it became clear it was time for a change.

"We were not effectively employing the CapEx we were given each year to grow and develop the property portfolio," Steven says.

To ensure Foodstuffs delivered on their goals for expansion and maintenance of existing stores, Steven and his team knew they needed a tool that could take their work to the next level.

## Delivering on time and on budget

Quickbase's no-code platform empowered the Foodstuffs team to create an entire property portfolio management ecosystem. The application tracks over 800 projects, with nearly 400 data fields for each project, and analysis available via over 150 bespoke reports. This now serves as the single source of truth for all property projects.

With all of Foodstuffs' property data now contained in one location, it is much easier to access real time insights and ensure accuracy of the reporting. The flexibility of the application means users can filter easily by development type, work stage, region, contractor, employee, and many more fields.

Steven's favorite aspect of the application is the "store-on-a-page" view the team created.

"This view serves as the corporate memory for all properties," he says.

In a few seconds, his teams can dial into any store within their portfolio to understand the history, ownership, performance, or check on the status of a construction project.

The property ecosystem Steven's teams have created has made them the source of truth for the entire organization. Stakeholders from across the business, including company execs, turn to his team for accurate data to make strategic decisions.

Since adopting Quickbase, Foodstuffs has gone from wasting 25% of every CapEx dollar spent to **delivering projects consistently 5%-8% under their initial budget.** They have also reduced project delays by roughly half. The teams have created accurate benchmarks that make it easier to track the progression of every single project. Additionally, their data is key for their long-term planning, informing the three and ten year plans the organization creates

In the end, Quickbase has given Foodstuffs more trust in more accurate data. Now, it's easier to reinvest in their stores, launch new projects, and effectively serve the needs of their customers.

**Quickbase is now "an indispensable part of how our property teams and key stakeholders across the business access our portfolio data and capital projects," says Steven.**

### With the Quickbase application, they can track:

- Allocated capital expenditure & on-target spending
- Store performance, compliance & regulatory reporting
- Project activity & value by region, brand, employee, contractor
- Construction timelines
- Scope & risks for every project
- Contractor performance

Empowering Business Through Real Estate Data

# Scaling Business & Keeping Henley-Valvoline a Well-Oiled Machine

Henley Enterprises, Inc. is the largest national franchisee of Valvoline Instant Oil Change. The company operates in over 240 locations across the country and employs more than 3,000 people. While the company's size is already impressive, Henley's decision-makers are always looking for new opportunities to expand.

One of the key leaders of this expansion initiative is Kelly-Ann Taintor, Associate Director of Corporate Development. She's been with Henley for 25 years and has moved her way up the company – starting as an administrative assistant and now overseeing corporate development – using her knack for getting things done and delivering impactful results.

"I oversee our corporate development process. This includes the workflow starting at initial analysis of a site, and continues through the legal process, permitting, construction or acquisition to the end which is opening day for a store," said Kelly-Ann.

**So, just how fast is Henley increasing their footprint? "We expanded 3 times the size within 5 years," points out Kelly-Ann.**

## Growing pains worsened by disconnection

With such an ambitious expansion strategy, Kelly-Ann and her team faced some eye-opening growing pains when they initially attempted to juggle numerous new locations openings on the same timeline. Looking back, Kelly can now recognize some clear issues:

- A lack of a central source-of-truth for their many different projects
- An inability to alert stakeholders when the status of a project had changed
- No standardized procedures for following an established new store checklist
- Costly delays for store openings

Just as Henley leadership was at a loss for how to reconcile workflow shortcomings and lack of visibility into project statuses, Quickbase was brought up as a potential solution for their project management needs.

"After we grew so quickly, it became apparent that our process was disorganized and stressful with everyone scrambling to get things done. It was overwhelming and clear we needed to find a solution that could solve a lot of our problems," reflected Kelly-Ann, "I realized how great Quickbase would be for Henley. The capabilities really sold me, the ability to automate various tasks and process, how it connects programs that we are using, and how it could completely streamline everything."

## Improving workflows, unlocking deeper insights, and centralizing crucial data

With so many different projects in-flight – each with their own unique processes and deadlines – it's critical that Kelly-Ann can monitor all of the moving pieces in her orbit all at the same times. Whether it is ensuring site negotiations are moving along, renovations are optimized to fit necessary equipment, making sure the right permitting is place for opening day, or tracking the overall project expenses store-by-store, Kelly-Ann and her team cannot afford any avoidable missteps.

Enter Quickbase.

Henley initially launched Quickbase within their construction department to help manage the workflows for the teams actually building their sites. However, Kelly-Ann and her team quickly realized how much of a difference Quickbase could make within the company beyond their initial scope

They immediately noticed the benefits of having all of their information in one place.

With their site development application in Quickbase, Henley was able to create a single source-of-truth for each of their stores. By centralizing all their data, they could make more informed decisions about next steps or whether renovations were necessary.

Quickbase ensures all stakeholders are aware of the current status of any project and that workflows continue as intended. "Order of operations is very important," explained Kelly-Ann. "It's crucial to give different departments notice to kick off their role in the process and give everyone enough lead time so everything is ready when a store opens."

The process for opening a store has now greatly improved and Henley has seen positive results. "We are able to open stores quicker, which saves us money during the development phase and also starts driving revenue faster," she continued.

Thanks to the initial success Henley saw with their real estate development application, Kelly-Ann has since built four separate processes into Quickbase. These processes help Henley track construction progress, site selection and development details, corporate governance of their multiple entities, and their overall property portfolio.

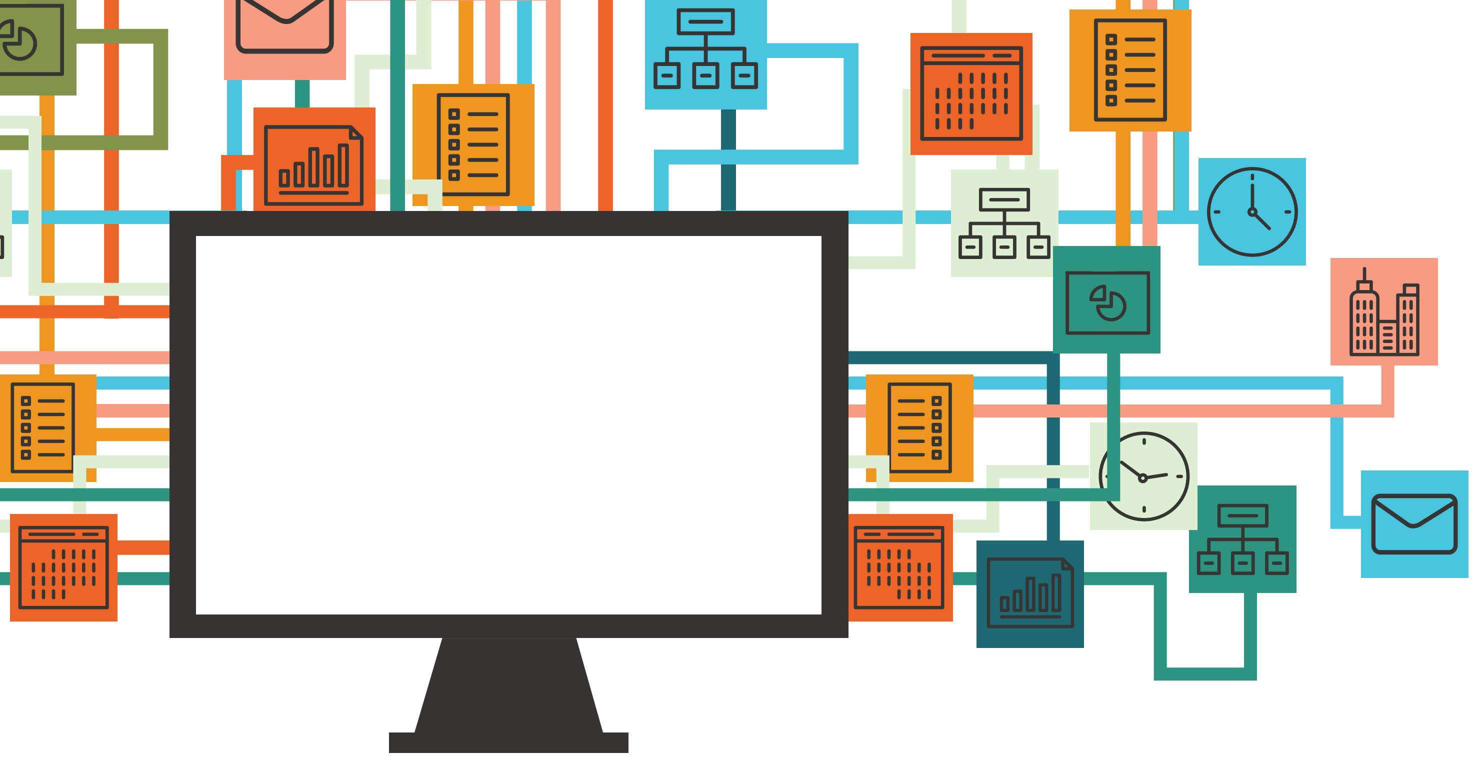
## According to Kelly-Ann, the benefits of using Quickbase include:

- Ease-of-use and ability to update processes and workflows on the fly
- The ability to create in-depth reports
- Automatic notifications
- Acting as a central source-of-truth for documentation
- Integrating with multiple platforms

Kelly-Ann is now the owner and main developer of Quickbase at Henley. She sees huge potential in the solution and has plans to further the company's use of the platform in the future.

She wants to build multiple applications for each of her processes so there's more oversight and control of each area. Additionally, as the company continues to expand and purchase more property, they need a solution to track the properties with third-party operators included in their real estate portfolio.

An innate ability – and desire – to tackle any challenges that come her way makes Kelly-Ann the ideal Quickbase user. She can easily create applications to solve multi-faceted problems and readily adapt to an ever-changing landscape.

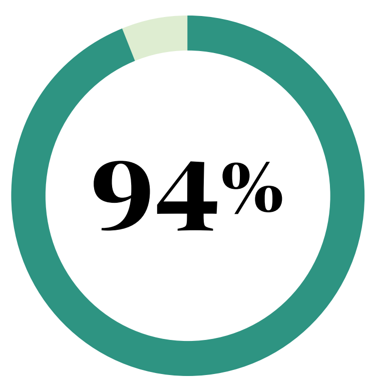


# The Post-Connected Enterprise

Throughout the years of focus on digital transformation, finding better ways to connect information, processes, and people has been top of mind. KPMG, for example, found in early 2020 that 79% of CEOs say they are personally responsible for overseeing cross-functional alignment in a way their competitors were not. Priorities for those leaders included taking a more active lead in technology strategy and increasing automation.

That report was entitled The Connected Enterprise – when the reality is, today, work is more disconnected than ever. Quickbase's own recent fragmentation study found that almost 94% of respondent organizations are at either moderate or high risk of experiencing the challenges of fragmentation. We have moved past the connected enterprise – and into the challenges of the post-connected enterprise. This is a time marked by processes that are completely disconnected from each other.

**So how did we get here? And how can we bite back at the connections that we somehow moved past?**




of respondent organizations are at either moderate or high risk of experiencing the challenges of fragmentation

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*You have more software to attack your challenges, and yet more problems as a result when that software lacks the flexibility to build, strong integrations, and the tight controls you need.*

## Too small an approach

Part of the problem is that the existing ways that people seek to solve this challenge aren’t cutting it. Too often, organizations view collaboration and connection as a problem solved on the individual and team level. While collaborative work management capabilities like task tracking and individual project management are important to getting work done, they can fall short of the scale of the problem. Similarly, when organizations solve projects with bespoke tools to manage individual processes, they can be creating even more data silos and in fact increasing fragmentation when they sought out to make work easier. And when teams turn to manual tools like Excel, the problem only becomes bigger.

This is what happens with more tools without anything to connect them. “You have more software to attack your challenges, and yet more problems as a result when that software lacks the flexibility to build, strong integrations, and the tight controls you need,” said Ryan Duguid, VP of Product Strategy at Quickbase.

With a continually growing tech stack and nothing to connect all of it, the small challenges are solved while the big ones remain. As a result, work suffers. More than 53% of respondents to our quiz are held up more than once a week by fragmented data, communication, and workflows. And we have to fill in those gaps and challenges with manual work – 70% of respondents said that they enter the same data into multiple places.

This is the flaw in a patchwork approach to solving business problems. Without the right capabilities to unify all of your data and systems, your people will have no idea where to turn for the information they need to get their jobs done and your most important projects – the ones that take the most coordination and communication – will be stuck in the mud. Your work will remain fragmented and your teams will remain frustrated.

## Critical connections

There is, however, a better way to create the cohesion that is missing. It starts with connection and automation. Instead of prioritizing point solutions, you should be looking to take a more holistic approach to solving fragmentation. Your organization has people doing tons of work every day – the right approach to collaboration and connection unites all of the information and systems that come from that work and makes sure everything is accurate and actionable.

More visibility by committing to a single source of truth will shine a light on the ways your work is disconnected – and show you where you can cut out duplicate work. Connected technology can build on this central source of truth by integrating platforms. The right collaboration tool, one that can be customized and layered with no-code, makes sure that there’s no need to ‘rip and replace’ software just to reduce fragmentation. Better automation, taken on by less than 40% of organizations according to Foundry, can be a major force to solve fragmentation as well. If technology leaders take a considered, organization-wide approach to this, you will remove the phrase “entered manually” from your vocabulary.

Learn from how Henley-Valvoline did this. In order to effectively expand their real estate portfolio 3 times in 5 years, they need to collaborate across multiple teams and processes. Construction progress, site selection, and portfolio management are all happening in concert, and information matches among coordinated handoffs. This comes through visibility, connection, and automation – as we like to say, they can see, connect, and control all of their critical processes.

Challenges like this mean people need the right information at the right time – and the post-connected enterprise doesn’t bring this. While work feels more disconnected than ever, taking the right approach will bring us to the connected enterprise that we have all been seeking.

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# Empower

## Together is how we make complex projects simple.

### June 7, 2023 | 10 AM - 2 PM ET

If you only add one event to your calendar this year, make it this one. This free virtual event is packed with thoughtful and engaging content to help you streamline your processes and increase your overall productivity in 2023.

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