

6 WAYS TO WIN THROUGH PROCESS

Process expert Jason Sayen and pros from ProjX360 offer tips on better managing your business.

BY KRISSY RUSHING TOMLIN

For any integration firm, process is crucial in all areas of your business — from sales to installation to accounting. A well-defined process can even help identify potential risks early in the project lifecycle to help your team anticipate and mitigate challenges. Spreadsheets and to-do lists holding hands isn't a process that you can build a business around. While implementing process can be challenging because it requires a thorough examination of your business operations, the results are worth the effort.

We chatted with Jason Sayen, process architect at I Am Sayen, Doug Greenwald, owner of ProjX360 and HTA Certified integration firm Creative Sound & Integration, and Ryan Thomson, process implementation at ProjX360, to understand key areas where AV integrators can change their thinking or improve their processes for better business and greater profitability.

#1 Processes First, Software Second

"Integrators must understand that if you don't have good processes already in place, software and apps — any of them — will not magically fix your business," says Greenwald. "What software is here to do is help guide and keep your processes in alignment. If you have processes in place, software is going to help streamline your business and make it more efficient, which in turn gives you a better bottom line."

"If your process isn't defined, you're a slave to your tools," adds Sayen. "Yes, you will have to bend your process to the software, but if you are forced to change your process completely, it's not the right tool. Most integrators have tried multiple pieces of software before finding the one that works the best. That literally costs tens of thousands of dollars. Invest in defining your process first."

According to Thomson, the AV integrators he onboards present a patchwork of software solutions — an average of nine pieces — to keep their workflows moving. "When they reach out to us, their goal is usually to eliminate many of those and use one piece of software as much as they possibly can."

#2 Process Pain = Profitability Gain

Change isn't easy, and introducing new processes into your organization is both time-consuming and disruptive. "When you start to dive into documenting and improving process, many businesses can't define the start or stop point, so it becomes overwhelming," says Sayen. "Look at your business through the lens of your client's journey and identify their touchpoints based on project milestones, phases, and departments/



From left to right: Ryan Thomson, process implementation at ProjX360; Doug Greenwald, owner of ProjX360 and HTA Certified integration firm Creative Sound & Integration; and Jason Sayen, process architect at I Am Sayen.

functions. Doing this gives you a strategy to decide where to tackle process first."

Onboarding new software for project management workflows and processes is a process in itself. "We don't try to sugarcoat it, adopting new software is painful for businesses. But there is merit to the old adage, 'no pain, no gain,'" comments Greenwald. "It takes a time investment to learn anything new. Process and project management software is no different."

In fact, this is why ProjX360 offers a one-on-one demo and sandbox versus a free trial period. "You need to do the learning to see the benefits of the software, and that won't happen during an unguided free trial."

#3 Examine Sales Processes

Sales is usually the first department involved in a project. Enabling the sales team with good process is therefore crucial for success. "A process of weekly meetings to discuss prospect status and proposal reviews with the team will catch potential issues with a project before it's sold. This lets the entire team know what projects are in the pipeline and allows them to catch things before they become a problem in production," says Sayen. "This way, sales can continue to sell and not get sucked into project management issues."

Establish your sales process and use software to enhance and execute it. For example, ProjX360 has sales process templates inside its sales CRM called Activities. "You can make Activities due at standard intervals. If you add that Activity template to the salesperson's pipeline, the software automatically populates dates for you. On those dates, you'll get an automated email, so Activities don't fall through the cracks, helping manage the sales process," says Greenwald.

#4 Don't Fumble the Handoff

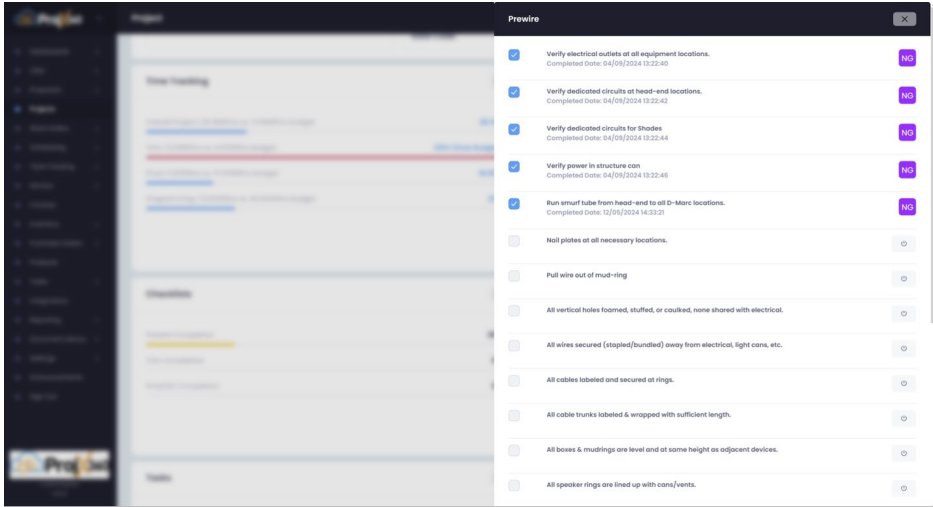
Process and project management is all about how teams work together. One project will likely be touched by every department and person at your integration firm, from sales to accounting. That's why good project management processes pay close attention to how a project goes through its lifecycle and the handoff from person to person, team to team.

"Where are your handoffs? How are they communicated? And how do you tell somebody else it's their turn?" Thomson asks integrators during onboarding.

"With most companies I interact with, the first breakpoint is not having a clearly defined process when transitioning a signed project into production," Sayen adds. "Define when communication updates should happen and to who. Weekly meetings are the manual process where updates should happen. If you aren't doing weekly meetings, start. No software will take their place. Once weekly meetings are established, you can see where software can fit in to manage daily updates."

Selecting project management software that excels at communicating the handoff for all steps of the project is key. "ProjX360 connects all of these handoffs with workflow. The whole reason we exist is to keep that process in alignment for AV integration firms," says Thomson.

For example, using the ProjX360 platform, if a salesperson is pushing a Proposal into a Project, the PM team is alerted, letting them know it's their turn. The PM team will push Projects into Product Requests to tell Inventory it's their turn. Then Scheduling will hand that off to the field. "Our software is designed for the AV workflow so you aren't trying to fit a square peg into a round hole," adds Greenwald.



ProjX360 augments your existing business processes. For example, Custom Checklists allow users to create To-Dos based on already-defined processes.

| Brand | Model | Product Type | Onhand | Requested | Queued | Ordered | Allocated | Needed | Added |
|---|-----------------------|--------------|--------|-----------|--------|---------|-----------|--------|---------------------|
| Allen, Brian - 76-230 Olmstead Place | | | | | | | | | |
| Sony | 878-4200005 | Proposal | 4 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |
| Sennheiser | 935 62 919754 (10422) | Proposal | 0 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |
| Crestron | DM 144 6254 | Proposal | 1 | 1 | 0 | 0 | 1 of 1 | ✓ 5 | 04/16/2024 12:24 PM |
| Sony | 89-05435 | Proposal | 1 | 1 | 0 | 0 | 1 of 1 | ✓ 5 | 04/16/2024 12:24 PM |
| Leos Speakers | H23-05 | Proposal | 1 | 1 | 0 | 0 | 1 of 1 | ✓ 5 | 04/16/2024 12:25 PM |
| Leos Speakers | H24V6 | Proposal | 2 | 1 | 0 | 0 | 1 of 1 | ✓ 5 | 04/16/2024 12:25 PM |
| Sennheiser | V1640 | Proposal | 2 | 3 | 0 | 0 | 5 of 5 | ✓ 5 | 04/16/2024 12:25 PM |
| Davis - 15955 N. 68th Blvd. | | | | | | | | | |
| Crestron | DM 144 6254 | Proposal | 2 | 4 | 0 | 0 | 0 of 4 | 4 | 04/16/2024 12:29 PM |
| Sennheiser | V1640 | Proposal | 2 | 4 | 0 | 0 | 0 of 4 | 4 | 04/16/2024 12:18 PM |
| Crestron | H2-35 | Proposal | 1 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |
| Leos Speakers | H23-05 | Proposal | 1 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |
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| Leos Speakers | A10-01-10-25 | Proposal | 2 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |
| Sony | 878-4200005 | Proposal | 4 | 1 | 0 | 0 | 0 of 1 | 1 | 04/16/2024 12:23 PM |

ProjX360's Product Request allows PMs to request products to be ordered or allocated, right from the Project.

#5 Scheduling Inefficiencies Weigh Integrators Down

Poor scheduling processes are a gargantuan waste of manpower and money for AV integration firms. "Imagine you send a team out to do a job only to realize they're missing product necessary for installation," says Greenwald. "It's a waste of an entire day, wages for your employees, gas, opportunity costs, and none of it is billable to the client because it's your mistake. Now you have a day that was profitable replaced by a day that eats into profits."

Putting a scheduling process in place and augmenting that process with good software is key. "Sit with the team and talk through the phases of a project," Sayen notes. "Define those milestones on when product is received and how it should be communicated. It needs to be in sync with the PM because while you are in between phases and products are being ordered, they are checking the site status. Those two should update each other in weekly production meetings or via communication software. Again, have a process first and then find software that streamlines it."

#6 Manage Scope Creep

Scope creep in project management is where a project's scope gradually

expands beyond the originally defined parameters, meaning new features, tasks, or requirements are added without proper adjustments to the budget, timeline, or resources, often leading to delays and exceeding project limitations. "There are two big perpetrators of scope creep for AV integrators: either the product changes and the cost goes up or labor increases. Anything within these two pillars will break down your job's profitability," says Greenwald.

"Usually scope creep happens because there either wasn't a clear scope of work developed up front or because the handoff from sales to project management didn't happen," says Sayen. "If the project follows a defined scope-of-work process and then has a proper handoff to allow engineering and the PM to say, 'Yeah, this won't work,' it will all get flushed out before it goes into production."

Keeping in alignment with process, software can help identify and stop scope creep. ProjX360 shows scope creep in bright red. "It's literally in your face on every work order and product detail page on the platform," says Thomson. "You can't ignore it. [Res](#)