

# MyAssistant

For Sage Timberline Office

CUSTOMER SUCCESS STORY



## MyAssistant improves productivity for general contractor

Todd Construction, founded in Oregon in 1942, has used Sage Timberline Office for nearly a decade. Ken Dixon, Vice President, implemented MyAssistant in 2007: “We saw MyAssistant as a great opportunity—we could use it to make our jobs go more smoothly and stay on top of everything. It seems like there are never enough resources to follow up adequately. Our goal with MyAssistant was to automate things we used to have to do manually, so we can take the bulk of the work off the project manager’s shoulders and let them work on the big problems.”

“We use MyAssistant to communicate with people we work with outside our organization. For instance, with submittals we use MyAssistant to send an email that reminds them they have submittals due in thirty days, and reminds them again in two weeks, and then one week, and then again as soon as they’re late. It can help make sure people don’t forget to get them to us.”

“We also use it for quote requests from subcontractors. When we have a change MyAssistant lets them know so they can tell us their impact and cost. We track when their response is due and MyAssistant can help make sure they get that information back to us.”

“When RFIs are overdue the project manager gets an email. We also use it to help track change requests. If any are outstanding the project manager gets an email.”

“We plan to use MyAssistant for pretty much anything that is date specific, and those tasks run sometimes every day. We also have some tasks that check for late items each Sunday, so people have an email with late items in their inbox on Monday morning.”

“A lot of times we attach a report to an email so people get a file of the information as well as the data in the actual email.”

“We also do some exception reporting to upper management, so everyone knows if performance standards are missed right away. It allows people to see and focus on the big exceptions— MyAssistant can find them and bring them to their attention immediately. People shouldn’t have to weave through all the stuff that’s okay to find the exceptions.”

“A bulk of people take action when they receive the MyAssistant emails, so we’re getting better response and people are turning things in in a timelier manner. It’s relieved us from having to do much of the calling we used to do following up on project documentation. It gets people to act. It works well.”

“It’s really awesome. All people have a limited amount of time—if they get emails from MyAssistant they get a slice of that time back. There’s so much power there, just the whole ability to follow-up and get exception reports is great.”

### CUSTOMER

Todd Construction

### INDUSTRY

General Contractor

### LOCATION

Tigard, OR

### INNOVATIVE SOFTWARE DESIGN

Founded in 2004, Innovative Software Design provides products and services that extend the power of Sage Timberline Office. The people behind ISD have more than sixty years of experience at Sage Timberline and are inspired by creating innovative solutions that help businesses be more productive.