



# CASE STUDY ROUND-UP SERIES

How implementing low-code and no-code can connect different parts of your business

## AT A GLANCE

### Partners

- TrackVia
- Joget
- Quixy
- Pipefy

### Customers

- J2 Link
- SSI Securities Corporation
- Sunworks
- Fluidra

## INTRODUCTION

This month we are bringing you real-life stories on how low-code and no-code technology can connect different parts of your business.

Many business leaders are aware of that their organization could be better connected, however, many struggle to find a place to start.

Extraordinary outcomes can often be achieved when outdated processes are enhanced by automation and technology. The number one challenge is typically selecting and planning the correct technical solution to assist in such initiatives.

With proper planning and assistance from a technology partner, organizations can increase efficiencies and interdepartmental successes in their organizations.

Continue reading to see real-life examples of how our partners are helping organizations across the world successfully automate processes, expand capabilities, and create efficiencies with the power of citizen development.



## J2 LINK - COMMUNICATIONS

Communications company J2 Link leverages no-code development to transform end-to-end processes with TrackVia.



### Problem

- By wanting to make the process seamless for clients it meant the management of scoping, budgeting, design, permitting, approval processes, procurement, construction, quality assurance, reporting, and more.
- Working with multiple municipalities also means keeping track of many projects at once. Often, one job could mean \$12 million in materials and over 6,000 invoices over an 18-month period.
- For J2 Link, the spreadsheets he started with to manage all the moving parts of his business quickly became too complex. Shared spreadsheets caused issues with data accuracy, and merging data became impossible.



### Solution

- Building out one element at a time, Jim was able to spread TrackVia throughout all the processes in his businesses. He used coaching from the TrackVia Services team to help him along the way, but also has leveraged TrackVia University to learn all the aspects of how to use TrackVia to the best of his ability.
- As processes improved, they started showing TrackVia to their customers. Eventually, they saw the efficiency that TrackVia supplied and began to ask for the implementation of TrackVia in their contract.
- They now implement their TrackVia apps with all their contracts and has become a preferred vendor because of the ease of which their clients can check on progress.



### Outcome

- Now J@ Link has 15-20 dashboards that they use for the different areas of their company, and continues to work and improve the processes and is able to quickly and easily tweak the information and data they see.
- Their clients no longer have to do in person checks, but can sign off on work right in the platform by seeing quality photos and invoices.
- Now that they have a better understanding of the data their clients need and the systems they work with, they're looking at how they can integrate their TrackVia platform with other municipalities' systems to make it even more efficient.



## SSI SECURITIES CORPORATION (SSI), VIETNAM - FINANCE

With assistance from Joget, SSI was able to reduce employee costs by 10% and reduce other procedural costs by 30%.



### Problem

- Stock exchanges are complicatedly specialized financial services, there is no application for central processing but a separate application for each department to help solve the customers' ticket post haste.
- They receive customer requests and then distribute the tickets to the respective department for follow-up.
- Managing and maintaining consistency in resolving each customer's ticket is a challenge to be addressed.
- The traditional application fails to protect privacy and information security when serving customers, and in adopting and deploying rapidly updated working procedures.



### Solution

- All data of different departments needed to be put in one place for better efficiency in management:
  - Easily retrieve information for reports
  - Build up standard business flows.
  - Spend less time digging through spreadsheets.
  - Centralized information system. Do not have to switch between apps & systems.
  - Convert customer issues into trackable tickets that can be resolved quickly
- SSI was able to use Joget Telesales CRM, a feature-rich leading telesales CRM solution providing powerful calling and workflow features. In a high-volume calling environment, any time saved will contribute to extra calls within the normal work time – which could lead to extra sales.



### Outcome

- All data were integrated with core system to prevent users from switching back and forth between multiple applications when looking for customers' information.
- The use of Permission Control distributes specific features and data so that Users can only access respective information and vice versa.
- Data management turns into a central process, which integrating data from multiple sources into one place helps Users save time at the rate up to 80% better than regular CX & Telesale businesses on data searching.
- Overall, there was a 10% reduction in employee costs and 30% in other procedures.



## SUNWORKS - ENERGY

The power of Quixy and automation assisted Sunworks with a 20% improvement in sales conversion.



### Problem

- Sunworks followed manual processes for all the activities such as lead management, estimation, proposal preparation, identification of BOQ and for further execution of the project.
- The processes lacked clarity and transparency across various departments, were complex and also time consuming.
- Sunworks implemented a readily available 3rd party solution but the system failed in terms of configuring workflows and customization.



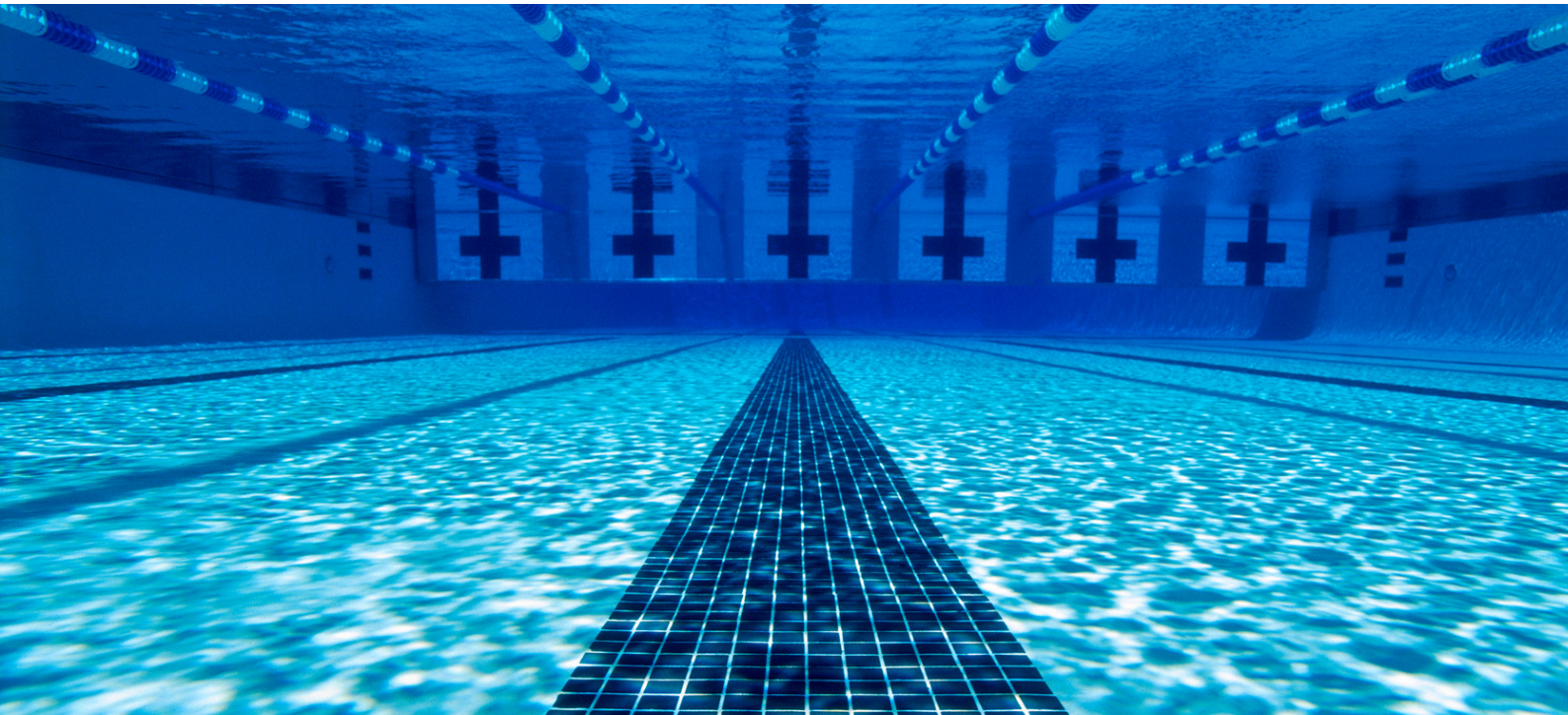
### Solution

- Sunworks approached Quixy to develop a comprehensive solution that catered to various requirements of its departments.
- Quixy studied the complexities and began the automation at two levels. The simple processes such as lead details capture was automated.
- Critical processes such as requirements gathering, estimation, automated proposal generation, identifying the bill of material, procurement, planning and installation were also automated.



### Outcome

- All lead information began to be systematically captured thanks to Quixy. It became easier to create follow-up tasks and track them through the platform.
- With Quixy's support the lead conversion for Sunworks improved by 20%.
- Based on the user data input, the system now generates accurate estimation based on the rules engine.
- The new system has also helped improve coordination between the stakeholders, increased project execution efficiency and enhanced transparency across all levels.



## FLUIDRA - CONSUMER GOODS

Fluidra utilized Pipefy to better control their operations and have reduced their new product launch time by 45%.



### Problem

- Previously, Fluidra used a project management tool to manage their new product development process, but it didn't deliver the flexibility and visibility they needed.
- One of the main problems Fluidra had was their previous tool not allowing different teams to run parallel processes simultaneously. One department could only start a step when another one finished, increasing the total time of a new product development cycle.
- Also, the previous solution was inflexible and high-code, so the IT team needed to get involved when Fluidra teams required any changes.



### Solution

- After training sessions with Pipefy's implementation team, the Supply Chain team could standardize flows and connect the four departments — Logistics, Engineering, Purchasing, and Marketing — with basic automation triggers.
- One example of their automation is when the Engineering department develops a new product, the Marketing and Purchasing teams can automatically start to plan the product launch and buy the goods to start the production.
- After seeing success with this primary process (which includes six parallel processes), Fluidra started to run more request flows with Pipefy, like air freight approvals and helpdesk ticketing.



### Outcome

- Data visualization is another improvement Fluidra has experienced. Managers can extract reports to measure process indicators, like days to complete each phase of the product development cycle and the total cost of shipping.
- Besides the autonomy that the Supply Chain team gained, Fluidra started to collect great results after Pipefy's implementation. Nowadays, leaders can better control their operations, and it's easy to manage each request and follow up with team members, if necessary.
- Six months after the Pipefy implementation, the total time to produce and launch a new product decreased 45%, while buying new goods decreased 66% — significantly improving efficiency.



*"Pipefy allows us to have autonomy. Nowadays, people aren't waiting for logistics anymore. Each department knows the right path and is empowered to customize the platform. So we don't need to ask the IT team to develop or implement new processes or simple changes."*

**DAN TIPTON**

Supply Chain Manager

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## IN SUMMARY

Low-code and no-code technology enables organizations to connect different parts of their business through automation and integration.

Due to increased integration and efficiency, organizations' project delivery was enhanced, allowing for greater emphasis on strategic initiatives.

## FEATURED ORGANIZATIONS

J2 Link	SSI	Sunworks	Fluidra
J2 Link works with telecommunications businesses throughout Canada to install and manage below and above ground fiber cable deployment.	SSI Securities Corporation (SSI) is a leading financial institution with the fastest growth rate at 2400 times. With strong financial capability, high standard corporate governance, and professional staff, SSI provides clients with diverse financial products and services, maximizing shareholders' value.	Sunworks is an initiative by seasoned professionals to bring high quality Advisory, Engineering and Construction Management services to Solar PV developers.	Fluidra is a global leader in pool and wellness equipment. Fluidra's mission is to create the perfect pool and wellness experience, offering a wide range of products, devices, components, and services.

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