

# CLIENTProfile

The ONE Platform for Trenchless  
Water and Sewer Infrastructure

*“Now, the mindset is being able to fix  
things as they’re happening.”*



SOFTWARE

## Project-level visibility, consistency, and lower costs

Robust expansion left Vortex business units throughout the United States and in Mexico and Europe using many different legacy systems to manage similar work. Disparity and, in many cases, lack of enterprise-class technology limited collaboration and created inefficiencies within and across the business units.

“We realized that **we needed to bring together all the systems we were working with and**

**consolidate them so everyone could have similar visibility** and consistency in the way they operate,” CIO Ram Vela explains.

Vortex also wanted to improve equipment maintenance processes. “We didn’t have a system to reduce costs or to give us the data to make good decisions about rental versus ownership, when to retire assets and when to purchase new assets,” Vela adds.



## Building from B2W Estimate to the full ONE Platform



Vortex inherited B2W Estimate following a 2017 acquisition. Impressed with the results, the company implemented it across its units and successfully standardized its estimating and bidding processes.

**“B2W provided the backbone and software to achieve consistent processes** and procedures by allowing us to develop and maintain a detailed database, track actuals versus estimated production quantities, and also pull historical productions for current bids,” states

Brandon Gerber, chief estimator.

“Once our estimating and operations teams reached a level of comfort with that system, we were drawn to the B2W platform approach,” says Vela. “We mapped out a sequential rollout plan by service and geography for the applications for field tracking, resource scheduling, equipment maintenance and e-forms.”

## Cohesive resource scheduling, dispatching and field tracking

The common, online B2W scheduling application lets Vortex crews, managers and executives see where people and equipment are and what they are doing in real time. With the software, Vortex pivoted from a central scheduling approach to a more efficient system, with dedicated schedulers for each region or business unit.

B2W Track allows crews to record labor hours and production data daily. Managers can compare

production metrics with the estimate, so they know what to focus on the following day or week.

“Electronic field logs and reporting are close to real-time,” says Matt Timberlake, chief administrative officer. “This has resulted in **significant project cost savings, where we may have missed some early warning signs** from a production or materials standpoint.”







## Seeing, understanding and cutting equipment costs

With B2W Maintain, Vortex established a company-wide system for routine, preventive maintenance. Using data to become more proactive and increase **adherence to the recommended intervals has driven significant cost savings**, according to Timberlake.

Daily inspection reports are completed with electronic forms. When forms indicate repair work is required, information is transferred to B2W Maintain and a repair

request is generated automatically. The automated process eliminates redundant data entry, speeds up the repair process and ensures accuracy.

Vela concurs that, with one system for maintenance, it is simpler and easier to analyze what is being spent on each piece of equipment and to make better decisions on maintenance and ownership issues.

# The big picture: collaboration and data-driven operations

B2W applications deliver consistency and process efficiency improvements within the estimating and operations workflows at Vortex. More importantly, Vela says a unified platform has helped the company take a real-time, data-driven approach to managing operations.

Senior leaders and operational personnel now have streamlined access to timely, consolidated data

without the need to tap into disparate data stores. “In the past, we were trying to fix things that had already happened,” Timberlake says. **“Now, the mindset is being able to fix things as they’re happening.”**





## An implementation plan that ensured buy-in

Timberlake says Vortex invested time during implementation of the B2W application to ensure users were adequately trained and also appreciated how the software benefits them and the company.

Business units white-boarded critical processes such as time entry, production tracking, scheduling, and job cost reviews as well the documents used. After defining the current state, they were able to cross off redundant processes and

documents and see where B2W could help them consolidate, gain efficiency as get better access to data.

**“Once end users see how the system reduces the time it takes to do their job, we have found that buy-in happens almost immediately,”** says Vela.

Vortex also hired a dedicated technology implementation specialist that focuses on implementation, training, reporting and enhancement roadmaps.

# “Thinking Big” and “Why Dig?”

Vortex thinks big about addressing water and wastewater infrastructure problems, often without digging. Headquartered in Houston, Texas and with more than 450 employees in 12 locations, the company provides advanced trenchless water and sewer products, technologies and services to renew municipal, industrial and commercial infrastructure.

## Vortex services include

- Condition assessment
- Manhole and pipe rehabilitation
- Engineering and infrastructure repair
- Cured-in-place and geopolymer lining



B2W  
**Estimate**



B2W  
**Schedule**



B2W  
**Track**



B2W  
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