



Solar maker uses workflow to power faster construction management

Leading solar energy systems maker needed a more effective workflow solution with a smaller price ticket.

Organization

Solar energy company

Industry

Energy

Country

United States

Business situation

The company needed a more effective and less costly way to implement workflows around its commercial projects.

Solution

The energy company adopted Nintex Workflow Cloud and easily integrated it with the other tools it already used including Salesforce, Box, and Qlik Sense.

Benefits

- 35% faster
- Saves about 640 personnel hours per year
- Reduces licensing cost
- Speeds workflow development, updates

What a leading solar company needs

This solar energy company knows that solar power has to be efficient to be successful. The company also knows that it has to be equally efficient in the way it constructs its solar systems. That's why they turned to Nintex.

With 500 active projects at any one time, the company's project managers, procurement personnel, buyers, contractors, and other team members need to get exactly the project information they need when they need it, and to forward information and approvals on to their teammates to keep those projects moving flawlessly.

The project management software that they had been using was, ironically, both too much and too little to suit the company. Too much because its licensing costs were high and getting higher. Too little because the software didn't integrate its workflows with the other applications that were essential elements of the its internal platform, including Salesforce as a central platform for data and processes related to customers and projects, Box as a document repository, and Qlik Sense for data analytics.

Broad application integration is “huge”

That’s why they adopted Nintex Workflow Cloud.

“Because Nintex Workflow connects to our other applications, Salesforce, Box, and Qlik Sense, our business users can continue to operate within the same Salesforce platform they’ve always used to get their work done,” says the Business Applications Manager. “Our developers used Nintex developer APIs to create the task management console right inside Salesforce. And Nintex automates all the interactions among these applications, keeping processes accurate, eliminating redundant data entry, and speeding the project lifecycle.”

The Business Applications Manager says they can’t overstate the importance of this broad integration. “The Nintex integration with our other applications is huge for us, because our business users don’t have to access a separate Nintex environment to get their work done. This minimizes change and risk, and the need for training. Our people can just continue to do what they do best—just more productively and effectively.”

As easy to manage as it is to use

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— **Business Applications Manager**

The Business Applications Manager estimates that Nintex solution is completed 35% faster than their previous process. In 2020 alone, the company achieved an estimated savings of 640 personnel hours through its use of Nintex. The company finds that workflows aren’t just faster with Nintex, they’re more reliable as well. Trouble tickets on workflows, for example, are 25% lower with Nintex than they were with the previous software.

Nintex was also especially easy for business users to understand and adopt. “Our business users adopted Nintex faster than any platform we’ve introduced,” says The Business Applications Manager. “Training was minimal because Nintex is so intuitive. We created 14 of our 32 workflows in a quarter, and saw full adoption by our project managers in another quarter. And we haven’t looked back since.”

“By handling workflow maintenance and updates ourselves, we free up bandwidth for our developers to deliver even more value to the company.”

— Senior Business Applications Administrator

The benefits that business users see from Nintex are only half the story. The other half are the benefits that the Business Applications team sees in managing it.

“With Nintex, it’s faster and easier to support and update workflows because I don’t have to use code; it’s drag-and-drop,” says Senior Business Applications Administrator. “The interface is simple to understand. And by handling workflow maintenance and updates ourselves, we free up bandwidth for our developers to deliver even more value to the company.”

Typically, the automated workflows kick off with a project team member accessing a Nintex Form through the company’s Salesforce console. The company is using Nintex Forms for everything from initiating customer projects to procurement actions, requests for proposal, obtaining risk insurance, and implementing material change orders. In addition to these forms for internal users, the company has a “request for information” form that external users, such as contractors, can access to obtain project details from its design engineers or others.

A project manager, for example, might initiate a project through a Nintex Form, with the integrations to Salesforce automatically assigning a project number and pulling in the names of relevant team members for the project, and Box integrations automatically aligning to the new job number and project, and storing the project form in the corresponding location in the repository. Nintex then notifies team members about project tasks in two ways: directly in their Salesforce consoles and via an email notification, both of which include direct links to the relevant documents in Box.

Seeing the big picture – and the future



The company also uses Nintex to monitor open tasks and integration with Qlik Sense to analyze their status, so senior managers can see both aggregate and drill-down data on tasks completed successfully, tasks delayed, personnel assigned to tasks, and so on.

The company plans to build on its success with Nintex – this is just the start of more automation to come.

About Nintex

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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