



Case Study

Octa Associates Ltd

Viewpoint for Projects Delivers Client-Side
Construction Management



Trimble
Construction

About the company

Octa was founded in 1973 providing client-side project management from start to finish (concept to close-out). The company manages communications with users, maintenance, architects, engineers, general contractors, subcontractors, specialty trades, local and central government, to name a few, on behalf of its clients, which include private companies, nonprofit organisations and government entities.

"We take pride in our ability to provide the highest level of service to our clients," says Brian Taylor, director at Octa. "Delivering our projects in a collaborative environment is a big factor in our success. Over 80% of our workload is repeat business. Clients want to know their project is being properly managed, tracking to budget and timeline, with no surprises."



Whether you're a contractor, consultant or employee representing the project owner, proper management of construction projects is necessary to control budgets and schedules as well as have information accessible for disputes. With Viewpoint For Projects, New Zealand's Octa Associates has been able to do just that.

Challenge

Octa has 100 staff members in six offices nationwide, with employees and workloads dispersed among those offices, as well as numerous construction jobsites. The opportunity to have a centralised document storage system allows for greater consistency between branches and tighter document control. Historically all records were paper-based, and as Octa's workload grew, the company decided it was time to update its record-keeping processes, as well. Octa is no stranger to innovation; after all, it was one of the first adopters of the critical path method of construction management in New Zealand.

Octa required a system that was cloud-based, secure, and allowed collaboration and configuration to match client requirements. Several platforms were investigated but they were all designed with a contractor focus and/or were not configurable to New Zealand's contract requirements.



Solution

Following a thorough review of options, Octa chose [Viewpoint for Projects](#) (VFP) as the solution. VFP meets all requirements for secure client-side document management. It provides a single source of truth that is accessible by consultants, client, contractors and other stakeholders as needed. VFP allows for a collaborative workspace so that each party can track the status of their documents. The process improves efficiency, reduces conflict and confusion and saves money for the client. Disputes are dealt with using information stored in the client's system rather than relying on the contractor. All information is readily accessible.

Octa systems are more consistent than before because all project data is stored in one place, making version control a simple task. Viewpoint allows automation of workflows, resulting in reduction of the mundane tasks, reducing transcription errors, and improving project manager efficiency to ultimately reduce client cost.



Results

VFP has changed how projects are managed and Octa's project manager productivity has realized a 20% increase. Systems are continuing to be developed that align to NZ contract or client requirements.

VFP is collaborative in nature, so suppliers that may have been weak in documentation are now held accountable, which reduces overall project and client risk.

The range of project data and documentation accessible through VFP allows Octa to largely avoid and to quickly clarify misunderstandings with contractors. For example, a subcontractor may confuse payment terms or amounts, but all details are stored in VFP. So, there's a record of the original payment agreement, as well as a record of the sub receiving and signing off on those terms.





Because Octa implemented VFP prior to the Covid-19 pandemic, the stringent New Zealand lockdown procedures had little impact on the team's ability to manage projects and maintain consistent communication with all project stakeholders via the cloud-based solution.

Octa maintains certification for a Quality Assurance System that complies with AS/NZS ISO 9001:2015, meaning project outputs, actions, information and advice delivered from the company must meet consistently high standards for process management, safety and efficiency. Octa's procedures are regularly audited by Telarc NZ.

Octa relies on VFP to manage its ISO 9001:2015 quality audits. In fact, ISO auditors regularly commend Octa on its use of VFP because it offers transparency, works from a single source of truth, and coordinates with all items being audited.

"Viewpoint For Projects allows us to deliver what our customers require, and we can automate any process, freeing our project managers from paperwork to focus on delivery," said Taylor.





ABOUT TRIMBLE VIEWPOINT

Trimble Viewpoint, a Trimble Division, is a leading global provider of integrated software solutions for the construction industry. Trimble Viewpoint software enables customers to integrate operations across the office, team and field to improve project profitability, enhance productivity, manage risk and effectively collaborate across the broad construction ecosystem. With nearly 8,000 clients, including more than 40 percent of the ENR 400, Trimble Viewpoint's innovations are transforming the construction industry by fully integrating operations across financial and HR systems, project management tools and mobile field solutions.

For more information, please visit [Viewpoint.com](https://viewpoint.com)

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