

CASE STUDY

# ECOVENTURE PROJECT OPERATIONS IMPLEMENTATION

The case study highlights our industry-specific approach to environmental consulting workflows, phased implementation methodology, and the resulting business impact across operations, finances, security, and client experience.



## Ecoventure Digital Transformation

Ecoventure Inc. is an Environmental Management Services Agency with a focus on oil & gas applications among other industries needing environmental services.

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**Website:**

[Ecoventure.ca](http://Ecoventure.ca)

**Industries**

Environmental Consulting

**Business size**

11-50

**Services**

Business process analysis and optimization, Digitization of field service forms and paperwork, Cloud migration and data management, Integration of systems across departments, User acceptance testing and training

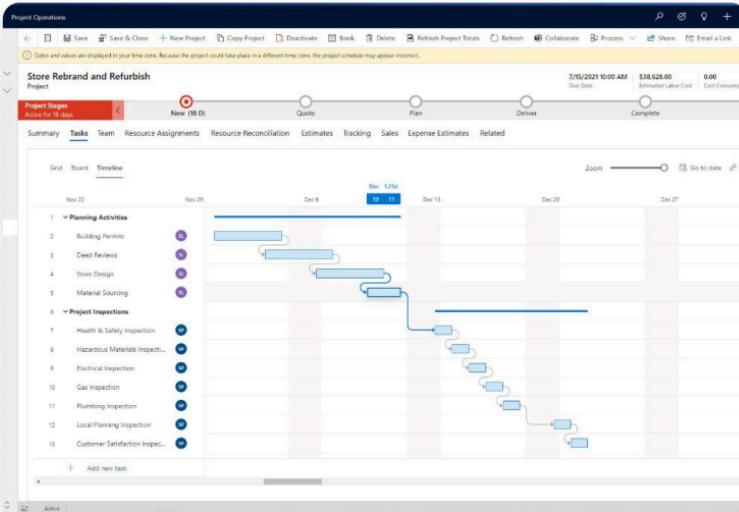
**Software**

Microsoft Dynamics 365 Project Operations, Microsoft Azure (cloud infrastructure and security), Customer relationship management (CRM) system, GPS and location services integration, Power BI (for analytics and dashboards)

# Introduction

In this case study, we highlight our partnership with **Ecoventure Inc.**, an environmental consulting firm that was struggling with disconnected systems, manual processes, and data security concerns.

Ecoventure approached us with a critical need to modernize their project management capabilities and improve operational efficiency. Their existing custom-built EcoManager system, while functional for basic needs, had become a limitation rather than an asset as the company expanded. Through the Canada Digital Adoption Program (CDAP), we collaborated with Ecoventure to assess their digital maturity, identify key pain points, and implement a comprehensive solution that addressed their immediate challenges while positioning them for future growth.



# Research Methodology

Our engagement with Ecoventure began with a comprehensive digital needs assessment (DNA) to establish a baseline understanding of their digital maturity across eight key operational indicators. Our methodology included:



## Stakeholder Interviews

Structured interviews operations, sales, departments



## Field Observations

On-site visits to observe and document workflow processes firsthand



## Technical Assessment

Analysis of current technology stack and system documentation



## Employee Assessment

Evaluation of employee technology comfort and adoption levels



## Industry Research

Research to identify best practices in environmental consulting



## Process Review

Review of current paper and digital forms used in daily operations

This multi-faceted approach allowed us to develop a holistic view of Ecoventure's operations and identify specific areas where digital transformation could deliver the greatest value.

# Challenge

Through our assessment, we identified several critical challenges that were impeding Ecoventure's operational efficiency and growth potential:

## Operational Inefficiencies

**Paper-Based Workflows:** Field staff relied on numerous paper forms requiring double and triple handling of data.

**Manual Data Entry:** Staff routinely entered the same information into multiple systems, increasing error rates.

**Email Dependency:** Email was the primary conduit for sharing files, creating version control issues.

**Limited System Integration:** Their custom EcoManager system functioned in isolation from other business tools.

## Technology Limitations

**Legacy System Constraints:** The custom-built EcoManager, while valuable, had evolved to try and serve too many functions for too many people.

**Inconsistent Notification System:** No reliable mechanism existed to alert employees when information was added or updated.

**Limited User Adoption:** New employees struggled with EcoManager's functionality, creating a two-tier usage pattern where "power users" could navigate the system effectively while others could not.

**Maintenance Challenges:** Updates to EcoManager put pressure on specific staff members, creating bottlenecks and single points of failure.

## Security Vulnerabilities

**Exposed User Credentials:** Basic security protocols were absent, leaving user credentials vulnerable.

**Email Security Breaches:** Previous incidents of email compromise had occurred.

### Confidential Information

**Exposure:** Sensitive employee and project information was being transmitted through unsecured channels.

**Lacking Multi-Factor Authentication:** No two-factor authentication was in place for system access.

## Strategic Challenges

**Resource Allocation:** Limited visibility into resource utilization made efficient scheduling difficult.

**Financial Tracking:** Project profitability was difficult to assess in real-time due to disconnected financial data.

**Employee Capacity:** While employees were passionate and committed, their availability to participate in a digital transformation initiative was constrained by existing workloads.

# Approach

Our approach to Ecoventure's digital transformation was methodical, collaborative, and focused on addressing both immediate pain points and long-term strategic needs:



## Initial Assessment & Discovery

- Stakeholder Interviews with dedicated client project team
- Process Mapping to identify inefficiencies and optimization opportunities
- Technology Audit of current stack including EcoManager, Sage accounting, Excel-based CRM
- Document Review of over 20 different paper forms and digital documents



## Solution Selection Framework

- Custom Solution:** Rebuilding EcoManager on a modern technology stack
  - Hybrid Solution:** Implementing function-specific software for different areas
  - Enterprise Solution:** Deploying a comprehensive platform (Microsoft Dynamics 365)
- Each option was evaluated against criteria including cost, implementation timeline, features, integration capabilities, and security enhancements.*



## Solution Recommendation & Blueprint Development

- Enterprise-grade security features addressing immediate vulnerability concerns
- Integrated approach that eliminated data silos between departments
- Cloud-based architecture enabling remote work and field operations
- Scalable platform that could grow with their business
- Strong database capabilities essential for an information-based business



## Implementation Strategy

### Phase One – Foundation & Data Management (1-3 months)

- Active directory update and cybersecurity policy implementation
- Migration of working files to the cloud with proper backup
- Digitization of field service forms
- Initial configuration of D365 Project Operations
- Quick-win deployment of CRM for accounts and contacts

### Phase Two – Testing & Training (4-6 months)

- User acceptance testing
- Employee training programs
- Business process integration
- Iterative testing and refinement

### Phase Three – Operating & Optimization (6-12 months)

- Phased rollout across departments
- Helpdesk integration for ongoing support
- Implementation of automation and approval workflows
- Finance system integration
- Assessment of additional module needs (e.g., Human Resources)

# Industry-Specific Solutions

As experts in digital transformation for professional service organizations, we tailored our implementation to address the unique requirements of environmental consulting. These industry-specific solutions were crucial in delivering value that went beyond generic technology deployment:



## Field Operations Enablement

**Mobile Field Forms:** Digitized over 20 paper-based field forms, designed to work offline and sync when connectivity was restored.

**GPS Integration:** Implemented location tracking for field resources to optimize travel routes and respond quickly to urgent client needs.

**Equipment Management:** Built custom equipment tracking functionality to monitor specialized environmental testing equipment.



## Environmental Project Management

**Environmental Compliance Tracking:** Configured the system to track regulatory requirements and permits for each project.

**Sample Management:** Developed custom functionality to track environmental samples from collection through laboratory analysis.

**Safety Monitoring:** Created dashboards to monitor safety metrics and incident reporting, supporting zero lost-time incidents.



## Client Portal Configuration

**Regulatory Reporting:** Configured client dashboards to highlight compliance status and upcoming regulatory requirements.

**Environmental Metrics:** Implemented specialized reporting on environmental impact measurements relevant to each client's industry.

**Document Management:** Established secure document repositories for environmental reports, test results, and certificates.

# Business Impact

Our implementation of Dynamics 365 Project Operations delivered transformative results for Ecoventure across several key business dimensions:



## Operational Efficiency

- 75% Reduction in Administrative Overhead
- 90% Decrease in Paper Usage
- Streamlined Approvals from days to hours



## Financial Performance

- 8% increase in average project margins
- Billing cycle reduced from 15+ to 5 days
- 5-10% recapture of previously unbilled work



## Enhanced Security

- Implementation of two-factor authentication
- Encryption of sensitive information
- Automated compliance tracking

# Key Insights & Roadmap

- Change Management is Critical
- Field-First Design
- Security as a Driver
- Data Quality Compounds Benefits
- Industry-Specific Customization is Essential

## Forward-Looking Roadmap

### Near-Term (6-12 months)

- Integration of Human Resources module
- Development of advanced analytical dashboards
- Implementation of AI-assisted scheduling
- Enhanced mobile capabilities

### Mid-Term (12-24 months)

- Client self-service portal expansion
- IoT integration for environmental monitoring
- Predictive analytics for project estimating
- Advanced document management

### Long-Term (24-36 months)

- AI-powered risk assessment
- Sustainability tracking and reporting
- Integration with environmental regulation platforms
- Expansion of digital capabilities

# Conclusion

Our partnership with Ecoventure demonstrates the transformative power of thoughtfully planned and executed digital transformation in the environmental consulting sector. By addressing immediate operational pain points while building a foundation for future growth, we helped Ecoventure convert technology from a limitation to a competitive advantage.



## Key Achievements

- Operational efficiency through streamlined processes
- Enhanced security protecting sensitive information
- Financial performance improvements
- Elevated client experience
- Improved employee satisfaction

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