Food service consulting firm WSR & Associates had been using everything from chalkboards to spreadsheets to manage its workload when project manager Ed Reich discovered LiquidPlanner six years ago.

“When I started working with my dad, he had it on a chalkboard,” Reich says about his father Bill’s original project tracking methods. “Then, we went to a whiteboard and tried to keep track of things that way. We tried several Excel sheets, but when keeping track of milestone dates—and then when those dates changed or something—it was always a nightmare to try and know where you’re at and if things were in trouble or not. It ended up being a lot of crisis management because you weren’t sure.

“As we pulled into LiquidPlanner and were able to allocate time and to estimate time to these tasks, it really helped me dial in to problem areas. I was able to say, ‘Okay, here’s a flag showing up on something. I need to allocate more time to this task and this project to keep it aligned.’”

Taking the Struggle Out of the Juggle

Because of LiquidPlanner’s predictive scheduling engine, firms like WSR & Associates can manage their multiple hospital, restaurant, and school kitchen design projects with ease. “Schools have been our bread and butter, but we do a lot of restaurants,” Reich says. “I was looking for a program that would allow me to not just start and finish one project and then start another. I needed to be able to run multiple projects at the same time; LiquidPlanner’s been very helpful when we’re juggling multiple projects at once.

“I’ve got five active projects that I’m working on right now, but there are several that are on hold. Several months ago, I had eight or nine that are

Top Benefits Achieved

- Multiple design projects and their phases can be managed at the same time.
- Tasks in trouble can be quickly identified and then rescheduled or have their resources reallocated.
- Cloud access allows project changes to be made anytime, anywhere, from any device.
active, but a couple of them dropped off," he explains. "In the architectural world, there are a lot of projects that need designing up front, and then, later when the client is ready, we will create the construction documents.”

As we pulled into LiquidPlanner and were able to allocate time and to estimate time to these tasks, it really helped me dial in to problem areas.

In LiquidPlanner, Reich places his company’s active projects into a package that has a higher priority than the package containing projects that are on hold. The active projects are then assigned to the appropriate client, and then tasks within those projects are assigned to a team member or project manager based on his or her skill set. For example, Reich manages tasks that involve Autodesk Revit, the building information modeling software, and his colleague Brian Boswell takes tasks involving AutoCAD, the design and drafting software.

“When a new project comes in, we first ask who’s going to manage that project,” Reich says, describing the company’s workspace layout. “From there, I’ll go in and assign a client and start working up some subfolders with the different phases.”

Most architectural projects comprise five design phases: schematic design, design development, construction documents, bidding, and construction administration. Schematic design, design development, and construction documents are crucial to every project for a kitchen and food service design studio, so Reich makes sure those subfolders are always included along with subfolders for meetings and invoices. Time is assigned to milestones and tasks, which are all housed within those phases.

While the ability to run multiple projects and their phases at the same time is one LiquidPlanner’s most attractive features, it isn’t Reich’s favorite.

“What I really love about LiquidPlanner are the Dashboards. I created my own dashboard that loops and pulls in all the different projects and milestone dates,” he says. “I have a widget set up that shows upcoming milestones. I can look down that list and see I’ve got Brighton High School as the next deadline I have, and then it goes into the different elementary schools and things. The Dashboards really help me prioritize what’s coming at me and the tasks I’ve got to work on, so things don’t get out of control that way. The Dashboards are awesome.”

Making Big Project Updates Anytime and Anywhere
Dashboards aren’t the only awesome tool that Reich uses regularly.

“If I go back to just the Projects under my name, I love how LiquidPlanner gives you flags that show if something’s on fire; that’s really helpful,” he says. “I have one of my favorite views where I can hit Tasks in Trouble and then very quickly identify those tasks so I can reschedule them or reallocate...
time to them.”

Dashboards and alerts came in handy when WSR & Associates worked on one of its most intricate projects, the corporate dining facilities for Young Living Essential Oils.

“Young Living was a big project for us; it was a showpiece,” Reich says. “It also showed that LiquidPlanner is really helpful in managing this size of project.”

When Reich and his team begin a design project, they break the kitchen up into systems: cleaning and washing, receiving and storage, food preparation, meal cooking, and service. These sections are often put into LiquidPlanner, and for each section, the team will add notes related to the needs of the end users: Will the receiving area need a walk-in freezer and a cooler as well as dry storage? What is the menu and what kind of cooking equipment will be needed? Will the staff just be washing pots and pans? How many people will be served each day? If the facility is a cafeteria, how fast

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are trays going to be run through the dishwashing area? All of those questions and more get asked and answered within LiquidPlanner, so Reich and his team know what size dishwasher each project needs and whether it should be a door-type, flight-type, or conveyor-type, for example.

With the Young Living facility, things went a little differently.

What I really love about LiquidPlanner are the Dashboards. The Dashboards really help me prioritize what’s coming at me and the tasks I’ve got to work on, so things don’t get out of control that way.

Most of the time, the architect and the client are in the same meeting with the kitchen designer; however, the initial meetings for the Young Living project were only between WSR & Associates and the architect. Reich and his team had entered the key milestone dates into LiquidPlanner and had begun work on their initial concepts. Then, they learned exactly how high-profile the project would be.

“We came up with some milestone dates and started designing,” Reich says. “Then, the architect told us the client was asking for a river that would run right through the dining and servery area. We started brainstorming some different ideas, and I jumped into LiquidPlanner and updated the tasks and milestones to reflect this new water feature going through the servery.”

Not only was Reich able to easily keep track of all project changes within LiquidPlanner and have the scheduling engine automatically update the estimated start and finish dates for each of his tasks, but he could also store assets like submittal drawings, product submittals from the contractor, and plumbing and electrical rough-ins.

With all of the firm’s projects, he has also found LiquidPlanner’s checklists and subtasks to be quite helpful.
“During a meeting, we’ll go through the 3D model and look at the whole kitchen with the client, and they’ll have a list of things they want to change—maybe equipment they’re adding or deleting or moving,” he says. “Then, I’ll come back to the office and add a task in LiquidPlanner that’s called ‘Revisions from Meeting (see checklist).’ On that task, I’ll go to the checklist option and add all those one-by-one items to the checklist so I can just check them off as they’ve been completed. Before I begin any work, I’ll also take a screenshot of the whole checklist and send it back to the architect and the client as a recap of what we went through in the meeting.”

Having access to LiquidPlanner on the go has also been extremely useful for Reich as he can pull up his assets and checklists during a meeting to instantly update a project in the moment.

“In our weekly meetings with architects, I’m able to pull up LiquidPlanner on my phone or on my iPad and put in comments or update milestones. Being able to make those changes on the fly is super helpful.”

As the firm continues to use LiquidPlanner, Reich plans to further explore its reporting features beyond how he currently uses Dashboards and reporting.

“Recently, I’ve been playing with the project costing, so I can give a project its contract value or price. I can get into a report that shows the contract price versus the time put into the project with a Delta; then, I can start to dial in to how profitable it is going to be for us.”