

2017

Apps Empowered™

 **EMPOWER**


**QUICK
BASE**



How Proving Quick Base's Value Impacted Our Organization and Jobs

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ABSTRACT

At large organizations, Quick Base typically grows first and fastest in small teams and business units. But how do those teams showcase the power and value of Quick Base to the rest of the organization? At PSL Group, a few inquisitive and motivated employees saw that Quick Base had greater potential than anyone knew and took action. After a difficult and challenging journey, this group was able to build a process machine that has vastly improved the quality of Quick Base apps at the organization and the impact of Quick Base on the business.

AGENDA

- ① How Do You Use Quick Base?
 - Case 1
 - Case 2
- ② Us!
- ③ How We Use Quick Base
- ④ Learn From Our Experiences
- ⑤ What To Consider

Key Takeaways

- Don't accept the status quo. "If you can think it, QB can do it." - Kirk Trachy
- Partner with Quick Base staff: Sales Director, Engineer, and Help Desk
- Use QB resources: webinars, EMPOWER, support page, Community, App Exchange
- Find other like-minded team members within your organization to brainstorm, plan, and implement
- If your builder isn't already an end-user, be sure to have at least 1 designated liaison

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1

How Do You Use Quick Base?

Let's Get to Know You

- ① What is your QB expertise?
 - Beginner
 - Intermediate
 - Advanced
- ② How long have you been a QB user?
 - Less than 1 year
 - 1-3 years
 - More than 3 years
- ③ Are you a builder?

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2

Us!

TYLER KIPPS

- PSL: 15+ years in operations, statistical data analysis, and reporting
- Quick Base: 10+ years, 5+ building apps, more recently the “advanced” features of APIs, javascript, etc.
- Home is Montreal, Quebec, where I live with my wife and two young children, Owen and Fiona.
- I enjoy running and collecting watches!



JESSICA MCCOWN



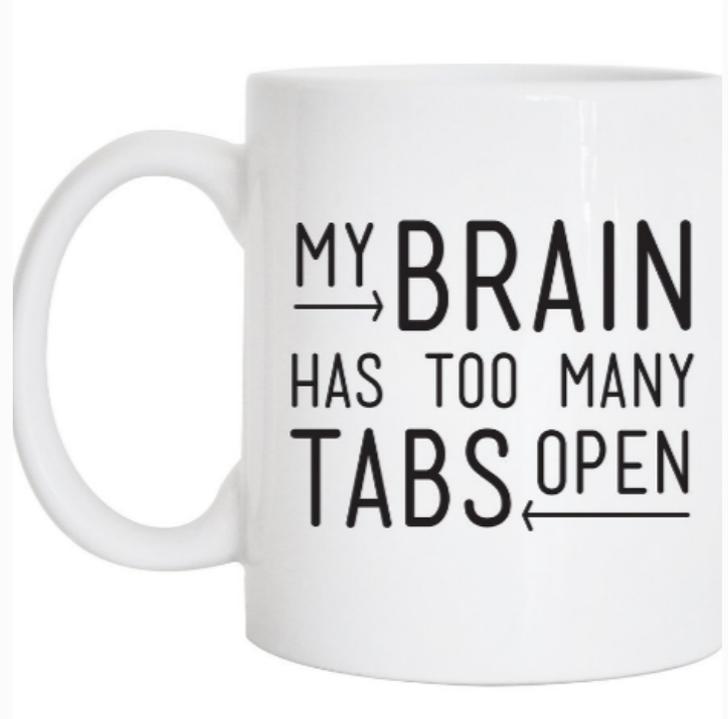
- Wife, mom of 2 girls, HUGE family
- Fun fact – I am the oldest of 29 grandkids
- Sr Director, Operational Effectiveness, PSL
- 16+ years in project management
- 13+ years in a leadership/management role
- Self-taught Quick Base user, very passionate to learn about and share the hidden gems of QB, and apply them to make everyone's job easier!
- I  Texas, Y'ALL!



Who We Are:

PSL Group

- No, not Pumpkin Spiced Latte!



PSL Group



- PSL: 30 different and unique brands
- Worldwide: London, New York, Montreal, Kuala Lumpur, Queretaro, and others
- 2 largest divisions comprising the majority of the organization with over 600 employees
 - MD&A (Market Data & Analytics)
 - MEC (Medical Education Communications)
- So... How did Jess and Tyler meet?

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3

How We Use Quick Base

What We Are Sharing and Why

- 10+ years - QB many unique apps, 4-7 primary tables
 - STATIC information
 - Excel w/1-4 sheets
- Quick Base was described to us as -
“Here’s a tool you can use, if you want to... to record some things.”

We had this universal resource that was available to all employees, but was incredibly under-utilized and not valued.

Here's the Magic!

Quick Base can do everything
that we were already doing
while using...



and worst of all: EMAIL

“A Tale As Old As Time”

- Learn how to be an Admin
- Create formula fields, form rules, and conditional relationships
- Improve what was already there

....Unfortunately, at the same time, other folks began questioning whether or not QB was really the tool to use moving forward



Why Use Quick Base?

We had to prove Quick Base is THE tool to use because it

- ① Eliminates redundancies and manual multiple entries
- ② Reduces human error
- ③ Is a database
- ④ Is a centralized location for information
- ⑤ We can build it without AppDev or IT specialists

Thus Quick Base makes a more efficient and smarter way to work!

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4

Case 1

Previously...

- My division used 5 apps (40% of Users):
 - Brand 1 (NA) Project Management app (15 tables)
 - Brand 1 (EU) PM app (13 tables)
 - Brand 2 PM app (17 tables)
 - Vendor/Invoicing app (5 tables)
 - Operations/task management app (7 tables)
 - » Itself was built on 4 older apps:
 - » DA, AA, GS, SP



Previously (Cont.)

- The Brand 1 (NA), Brand 1 (EU), Brand 2 PM apps had many similar fields
- The Vendor/Invoice and Operations Management apps:
 - each created projects in order to build other tables (invoices, vendors, ops tasks) around them
- All five apps:
 - one one-to-many relationship in which Projects was the parent and all other tables were children
- The five apps should be combined into one app (Research Hub!)
 - Tables, forms, emails, etc could be shared between them



My Approach

Brand 1 (NA) PM app

	B	C	D	F	H	I	J	K	L	M
1	Project Name	Project Status	Consultant	Project Manager	Survey Length	Service	Business Unit	Company	Client contact	Status
2	Merck CoP HIV	Closed			10 minutes	Instar Custo	Instar Canada	Merck	Frosst Canada	Complete

Brand 1 (EU) PM app

	A	B	C	D	E	G	H	I	J	L
1	Project Number	Project Name	Description	Topic	Project Summary	Survey Builder	Account Director	Study Type	Project Timelines	Status
2	MF12569	Chronic Stable Angina	Chronic Stable Angina	Chronic Stable Angina	Jonathan De Corday Long	Daniela Dodaro	Full Service			Closed

Brand 2 PM app

	A	B	C	D	F	G	H	I	J	K	L
1	Project Name	Project Number	Description	Topic	Project Manager	Survey Builder	Account Director	Study Type	Project Timelines	Recruitment Plan	Status
2	LESCOL XI MR	M212033MED	Treatment of	Treatment of	Francine Sadiku	Yamina Patel	"Elve Roberts"	Full Service			Closed

My Approach (Cont.)

Projects Add Project

SETTINGS REPORTS & CHARTS

Number 999000523

Name CML ATU

BU Brand 1

Survey Duration 30

Ops Project Type Full Service

Fielding Method N/A

Name of Outsourcing Agency Internal SP

Field PM

RMPM

Programming Status Not started yet

Survey Builder

No

Programming Add SP task

SETTINGS REPORTS & CHARTS

Project number 999000523 - Test project 1

BU Instar Canada

Delivery Team NA

Instar Service Custom Qual

Client Company1 - test

Client-specific standards to be followed:

Research Manager

Project Manager Tyler Kipps

Duration (as per the pricing tool) 15

Complexity Simple

Wave Study? No

Overwriting? * No

Pilots? No

Better

Major Breakthrough

- Creating email notifications meant elimination of email templates. This would prove to be a turning point (as everyone hates email!)
- Being able to replace nearly all email requests triggered interest in those previously unfamiliar with QB - and helped make rollout of this new app easier



Currently...

- Our domain uses one main app (Research Hub)
- 200+ users
- 38 tables (arguably 10-12 are dead or archived)
- Nearly all tables relate to Projects (see: relationship diagram in Appendix)
- Excel reports have been replaced with QB reports
- Emails, templates have been replaced by forms and notifications
- Unique views for all roles



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5

Case 2

MEC's Problem - How It All Started

Basic, but 57% of Users

Business	# of Tables	# of Users	Roles
A	13	45	19
B	14	58	19
C	12	46	20
D	6	17	14

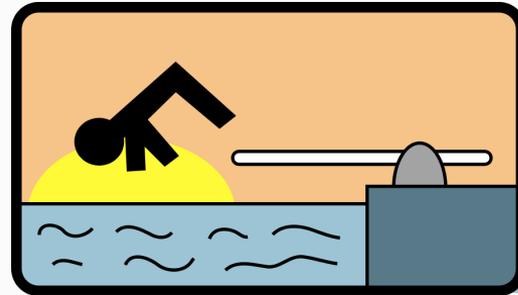


Why Was This a Problem?

- Management had no overview
- ONE QB Admin
- Many User Roles but all had Admin rights
- All forms were static

... And How Did We Fix It?

- If you remember, we had ONE “official” Admin to all the apps
- Basic research to learn more about QB ... and I had a new hobby!
- Tasked with improving project development tracking, improving timelines, and more efficient release of our programs
- Examined our business and teams, and identified similarities in processes, resources, and vendors
- I dove in!



My Method

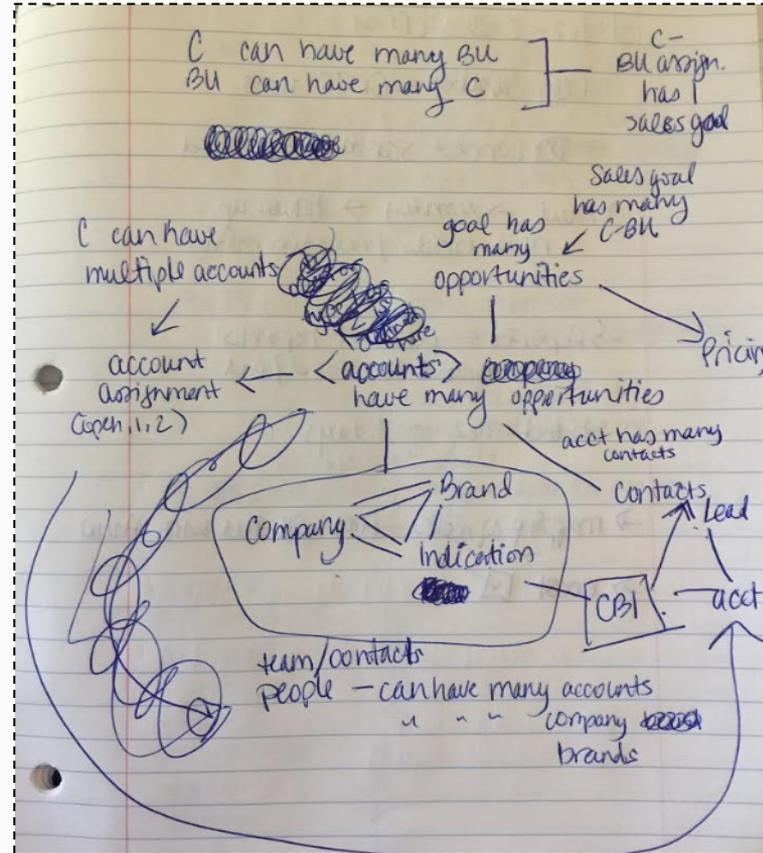
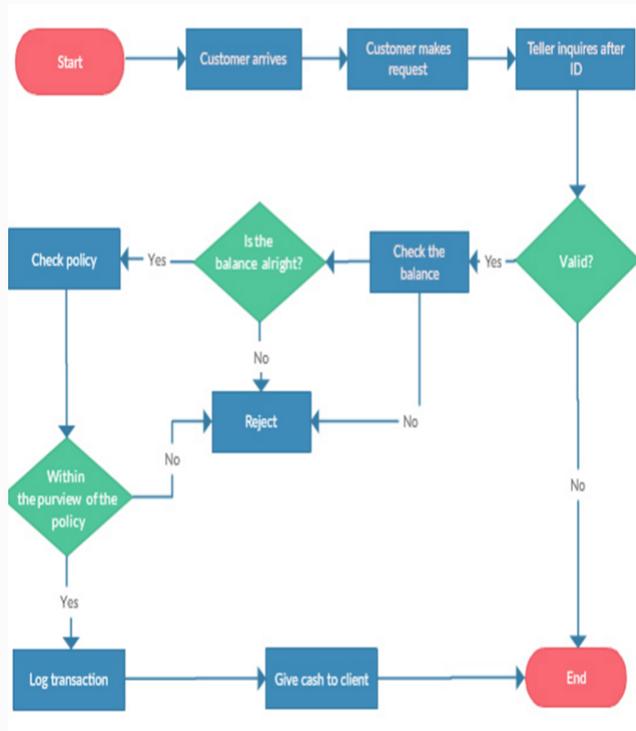
- ✓ Just start building the app
- ✓ Start over...
- ✓ Make a flow chart
- ✓ Notifications
- ✓ Reports
- ✓ Manager needs vs User needs
- ✓ Scalable, consistent, and intuitive



Administrative

Date Created 05-05-2017 10:06 AM	
Estimated Time to Create (hours) 4.0	
Date of Request 05-05-2017	Assigned to GD Date 05-05-2017
Ready for Review Date 1 05-08-2017	Revisions 1 Date 05-10-2017
Revisions 2 Date mm-dd-yyyy	Revisions 3 Date mm-dd-yyyy
Revisions 4 Date mm-dd-yyyy	QA Revisions 1 Date mm-dd-yyyy
Ready for QA Review Date 3 mm-dd-yyyy	Create HR Date mm-dd-yyyy
Post Launch Change Opened Date mm-dd-yyyy	Post Launch Change Compli mm-dd-yyyy

Dream vs Real Life



MEC Example 1 - Timelines

Program Timeline

Briefing Meeting

mm-dd-yyyy



Date of Final Interview

mm-dd-yyyy



Date Script Editing Began

mm-dd-yyyy



Date Slide Request Submitted

mm-dd-yyyy



Sent for Faculty Reviews

mm-dd-yyyy



Sent for CME Review

mm-dd-yyyy



Projected Date for CME Review

mm-dd-yyyy



Materials Certified by All Institutions

mm-dd-yyyy



Date Archived

mm-dd-yyyy



Timelines

New Timeline

More ▾

0 Timelines

	▾ Process Step	▾ Proposed Start Date	Real-Time Projection	Actual Start Date	Notes/Comments

MEC Example 2 - Audience

Audience Details

Primary Audience quantity

Primary Audience description

Primary Audience list source

PA Priorities/Specialties

Primary Audience Interests

Primary Audience Notes

Secondary Audience Quantity

Secondary Audience Description

Secondary Audience list source

Secondary Audience Priorities/Specialties

Secondary Audience Interests

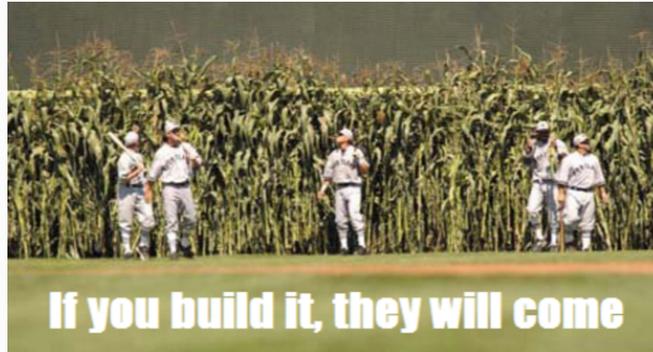
Secondary Audience Notes

Primary & Secondary Audience Details

New Audience More ▼								
	Type of Audience	Requested Quantity / Priority	Actual Quantity	List Source	Profession	Specialty	Region/Country	Region/Country N

Where We Are Today

- 4 apps to 1 app
- ID efficiencies
- Multiple projects with Trinity Integrated Solutions
- Internal resource ~ 20 hours/week
- **I am hiring someone to start building my team!**
- Linking Quick Base



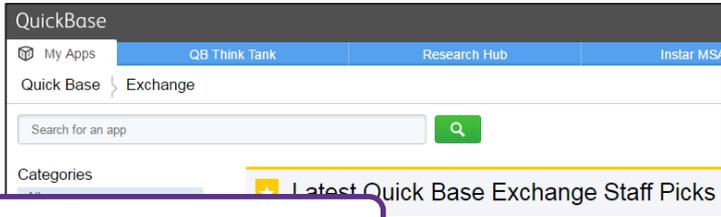
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Learn From Our Experiences

Our Most Used Resources

- Guess and test
- Account Reps and Engineers
- Webinars - Live trainings and on-demand

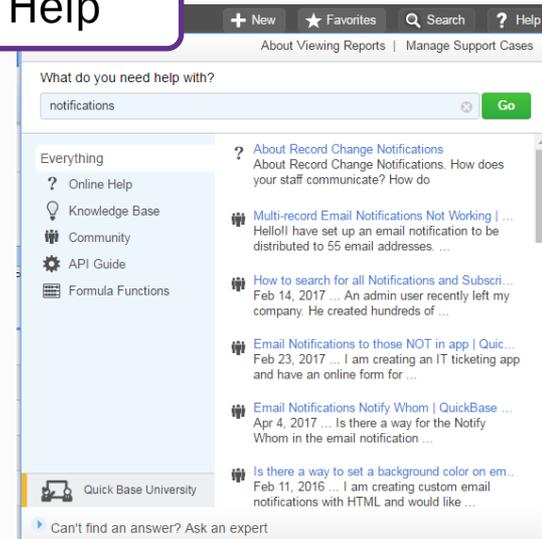


App Exchange

QB Support



Help



Our internal “QB Geek” team and EMPOWER



#EMPOWER2017

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7

What to Consider

When Creating or Expanding an App

- Alternate ways to plan your new process or app
- What do you want out of the information you put in?
 - How do you enforce compliance?
- Who will be using this app?
- Finally, plan user roles and permission access

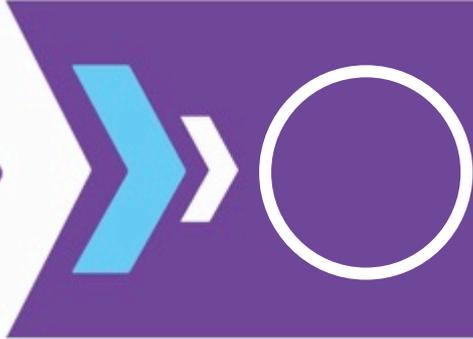
Key Takeaways

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- Partner with Quick Base staff: Sales Director, Engineer, and Help Desk
- Use QB resources: webinars, Empower, support page, Community, App Exchange
- Find other like-minded team members within your organization to brainstorm, plan, and implement
- If your builder isn't already a user, be sure to have a designated 1 or more liaison(s)



THANK YOU!





Appendix

Recommended Resources

- Guess and test
- “Help” search feature
- Quick Base Support
- Account Reps and Engineers
- The App Exchange
 - Magic Buttons
 - ABC Project Manager
- Webinars - Live trainings and on-demand
- Create an internal “QB Team”
- EMPOWER 2018

Areas to Consider Consolidating into QB

- ✓ Excel spreadsheets
- ✓ Google Sheets
- ✓ Google Docs
- ✓ Word docs
- ✓ MS Project
- ✓ Smartsheets
- ✓ Worst of all: EMAIL

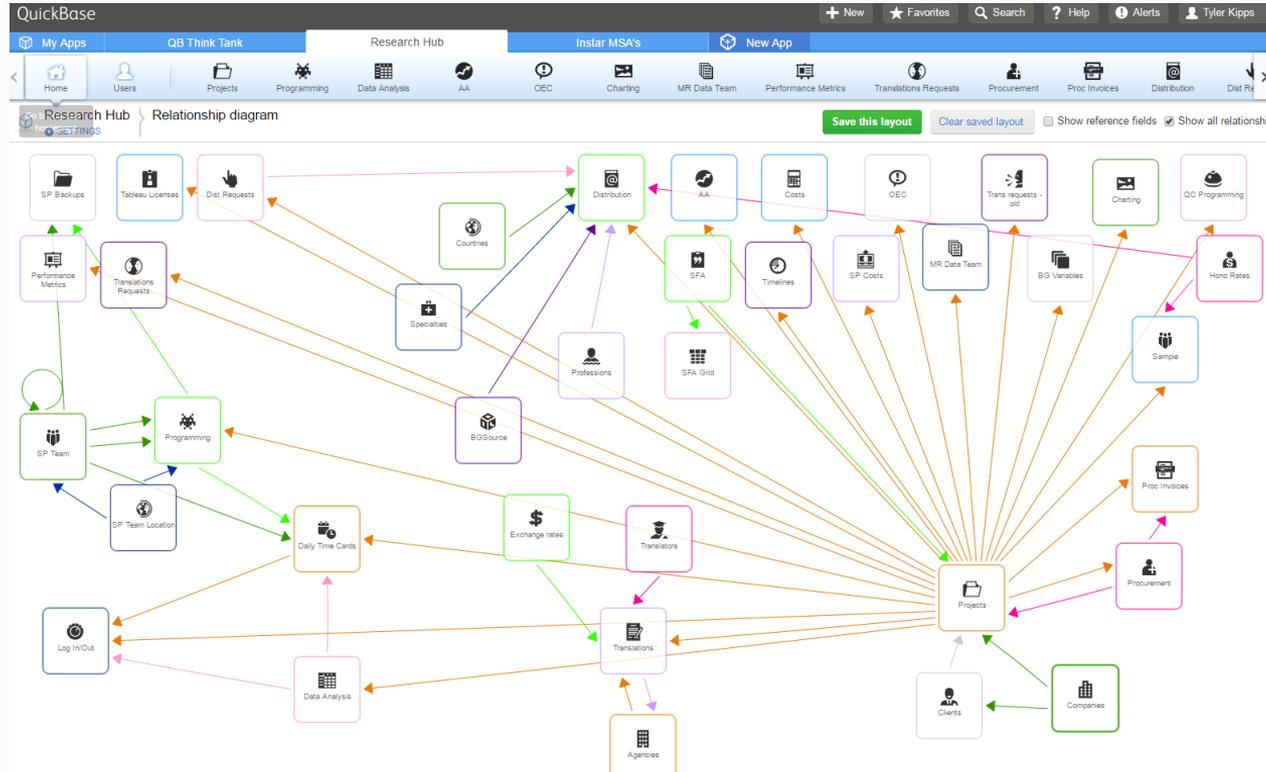
The Value of Quick Base

Quick Base is THE tool to use because it

- ① Eliminates redundancies and manual multiple entries
- ② Reduces human error
- ③ Is a database
- ④ Is a centralized location for information
- ⑤ Can be built without AppDev or IT specialists

Thus Quick Base makes a more efficient and smarter way to work!

Case 1 Relationship Diagram



Business Areas to Evaluate

- Review information that teams were sending in emails
- Google files, Excel sheets, Word docs - these were our tools
- Collect historical requests from management
- Evaluate the existing fields and confirm they are not entry-, report- or even user-friendly
- Open-text entry gives no indication of what it was supposed to detail
- Date fields give incorrect context

Case 2: My Method

- Just start building the app
 - It looks cool and it has lots of data, but there are some limitations
 - Realize that I should have had a “plan”
 - Pause and think
- Start over
- Make a flow chart
 - Name my tables
 - Evaluate what information will relate to other information i.e. Relationships
 - Are the relationships conditional? Who is the child, the parent?
 - What fields need to be where?
- Notifications
- Reports
- Manager needs vs User needs
- Scalable, consistent, and intuitive

Encouragement

- Don't accept the status quo. "If you can think it, QB can do it." - Kirk Trachy
- Partner with Quick Base staff: Sales Director, Engineer, and Help Desk
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