Clean Vapor scales their business with Microsoft's Platform for PPM

Clean Vapor is an environmental engineering and construction company focusing on vapor intrusion and radon mitigation. They are unique in their industry in providing a full-service solution for all vapor intrusion needs.

As Clean Vapor planned for growth, they recognized their need for a user-friendly project and portfolio management tool to meet current needs and to scale with their growth. They turned to Microsoft's platform for PPM, where Microsoft Project for the web delivers work management capabilities and Sensei IQ provides project and portfolio management as a managed solution on the Power Platform.

Clean Vapor is planning for significant growth in the coming years, and they are excited for Sensei IQ as the tool and Sensei Project Solutions and their partner on the journey.

CLEAN VAPOR™

AT A GLANCE

CLIENT NAME
Clean Vapor

LOCATION
United States

SIZE
30+

INDUSTRY
Environmental engineering & construction

Client Challenges

As Clean Vapor quickly expanded, they soon recognized the need for a more robust solution to manage their work. They also needed a tool that met their current needs and scaled as their company grew. Ryan Hatton, Director of Business Development, says, "We needed to be able to process a higher level of revenue, which meant a higher number of projects in our project management system. We recognized that the systems we were using would break down if we tried to grow any more. We needed a more powerful platform that enabled an integrated set of tools for project management to take us to the next level."

At the time, projects and proposals were being managed in spreadsheets; when new team members joined the company, it was very hard for them to learn how to use the nonintegrated system. Not only was it hard to learn, it was also difficult to manage. "I knew we needed to get out of Excel and into a project management tool," Hatton stated.

"Everyone in the organization," Hatton continues, "many of whom are 'informal project managers' and business users, needed to track what they needed to get done, and management needed to have visibility into everything. We needed to make sure 'balls didn't get dropped.' We needed a system where a team member could easily see what proposal or project was 'in their court' and the key deliverables associated with that project."

Clean Vapor was growing quickly and needed their communication across projects and portfolios to keep pace with their expanding team. Hatton explains, "We needed our dashboards to show all the projects going on in the organization, and then break it up into programs. The program manager needed to have visibility into all the projects in their program, and the project manager needed to have visibility into the details of their projects and deliverables. In addition, management needed to have an easy view into everything going on across the organization, so they knew what decisions to make and what to prioritize."

This growth and the need for better project and portfolio oversight led Clean Vapor to engage Sensei Project Solutions

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Partner Solution

When it came time to choose a solution, Clean Vapor considered several tools and platforms, but finally chose Sensei IQ on the Microsoft Power Platform with native support for Project for the web. Hatton says, "I've always liked Microsoft products, and Sensei has pre-configured everything nicely, yet still allows us to tailor for our specific needs and how we want to use it. It 'lowered the barrier to entry' to get us into more formalized project management and reporting in a short period of time."

Hatton has been particularly impressed with how user friendly Sensei IQ is. He says, "I'm really passionate about the user interface for our team members that are using a tool. Other project management tools had user interfaces there were ugly, slow, and difficult to use; I knew that people wouldn't use them." Hatton praises Sensei IQ for being intuitive and cleanly organized, with data entry fields that are clearly labeled: "You don't have to go searching through a bunch of menus to enter your information."

While Sensei IQ as a turn-key solution provided significant out of the box functionality, its customizability was a key factor in their choice. "We needed something that was attainable for our current situation, but that provided the 'head room' for us to achieve our growth goals. We didn't want to have to switch tools when we reached subsequent revenue levels."

Clean Vapor considered other tools but were not satisfied with what they saw from any of them. Some of the more common robust project management tools looked very user intensive and would be very time consuming for project managers to enter schedules and updates. As for Monday.com, "They sure have lots of ads," says Hatton with a chuckle, "but they looked really light on substance, too light for us; we just didn't trust it to manage an entire portfolio." Sensei IQ, on the other hand, provided all the benefits of Microsoft Project for the web, with the added extensibility of PowerApps to provide advanced portfolio management scenarios and resource management. In addition, it uses Power Automate for notifications and approvals, and Power BI for visibility and insight through automated reporting.

In fact, their use of Sensei IQ has driven them to be more of a true "Microsoft shop." "We used Office," Hatton says, "but at the time we began engaging with Sensei we weren't using a bunch of Microsoft tools; now we are. We wanted our project management choice to be compatible with our CRM choice, so after choosing Sensei IQ as a project management tool, it made sense to choose Microsoft Dynamics as our CRM tool. I knew that if we chose Dynamics instead of, for example, Oracle, it would be easier to port our CRM opportunities into the proposal in Sensei IQ. I wanted to 'stay within the Microsoft family' as we made subsequent tool-selection decisions. That also makes license management easier."

Hatton had ideas about what processes needed to be implemented, but he relied on Sensei IQ and the Sensei team to help him clarify and refine those processes. "It was a two-way street," he says. "Seeing Sensei IQ's out of the box process design helped me understand what was possible and how to close the gaps." He concludes, "Sensei IQ presents solid best-practice processes and visualization of those processes, and that's where the magic happens."

Client Benefits

Clean Vapor is already seeing benefits from Sensei IQ. "As soon as we set up our model for organizing projects and had the portfolio view of timelines, we got an organized view of the company very quickly," says Hatton.

Using Sensei IQ has brought much-needed structure and visibility throughout the project lifecycle. Because of the integration with Dynamics CRM, Clean Vapor is able to track opportunities and manage the intake of proposals. And whereas in the past it was possible for a new proposal to get lost, now with improved communication through using Project for the web and integrating with Dynamics CRM, they have full visibility.

Hatton notes, "Sensei IQ has helped us know where a proposal is in its development in the system and communicate our process in digital form with the dashboard. Our employees perform a variety of disciplines, and this ability to visualize the process helps everyone gain insight into both the entire portfolio and their place in it."

The dashboards and email notifications have helped Clean Vapor stay more organized and communicate better as a team. In fact, Hatton says, "We use Sensei IQ to run our weekly Monday morning staff meetings. Everyone can see the status of programs and projects and what they are responsible for." The holistic view from Sensei IQ dashboards helps them prioritize projects. The embedded e-learning also has provided valuable guidance for the team. "Training videos in the tool are very helpful, and if team members aren't sure about something, they have a library of on-demand videos to learn from," says Hatton.

Clean Vapor has also appreciated working with Sensei on their deployment. Hatton says that Sensei has been very responsive from the beginning of the relationship, and has effectively shepherded them through the process, from sales, to onboarding, to deployment help. "Working with Sensei on the deployment was hyper-efficient because it is very clear that there is a senior skilled subject matter expert on the other end of the call. That goes a long way in speeding up the implementation.

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