

## Streamlining Data Collection to Boost Margins

*Level5 exclusively serves financial institutions in developing and implementing growth strategies through a continuum of five levels of service including strategic consulting, real estate, integrated design, construction management and branding.*



"Key Survey has streamlined a tremendous amount of what I'll call the sort of mundane gruntwork for us," says Arp Trivedi, Senior Consultant at LEVEL5. "But on the other side, it's really helped us to keep our information very clear, to streamline the entire process."

LEVEL5, which does real-estate development work on behalf of financial institutions, is a mid-sized consulting firm whose work runs the gamut from economic development studies to the actual design and construction of banks and credit unions.

"We look at demographic, economic development, infrastructure and those kinds of things within a given market," Trivedi said. "We take that information, compile it, report it, analyze it, draw conclusions and make recommendations. We also do the operational side - we go in there and do an operational analysis of their headquarters operations, and in some cases their branches."

Before Key Survey, LEVEL5 had a paper document called the Employee Job Function Survey, asking questions such as 'What do you do', 'How often do you do it', before going into space concerns: 'What's your desk like?' 'What's your work area like?', 'What's your department like?', and so on. It was a 14-15 page document that every employee had to go through and mark up.

### **Paper surveys are inefficient. Replace them with Key Survey.**

"So by the time you were done," Trivedi said, "if you were working with an institution of 100 employees, you've spent 1500 pages. It's much more time-consuming dealing with paper. And then the worst part about it was getting the information back and having to compile it into something that was useful. Key Survey has completely done away with that process for us, and what used to take us 20-25 man-hours at least, probably now takes us three or four."

Saving time isn't the only way LEVEL5 has benefited by switching this process to Key Survey. Because the data is automatically compiled into a table, Trivedi can go into a meeting and speak directly from the document about the salient points for a specific employee or department.

### **Collate your results rapidly. Organize and present them.**

"You can put all the data together in a departmental view and it's beautiful because I can see the eight people in the department, what they're saying about it, and I can quickly give some feedback to management: look, here's where you're strong, here's where you're weak."

Beyond that, Key Survey is helping LEVEL5 differentiate themselves from their competitors.

"Now we're going to our clients with something that's easy to use, easy to understand and quick compared to what we had before," Trivedi said.

In the past, client-company leadership had sometimes objected to their employees taking the survey, which gave LEVEL5 essential information, on the basis that it took too long - fifteen or twenty minutes per employee. And with that length, employees would put off the survey.

The Key Survey version of that survey, with the autofill feature letting LEVEL5 insert details like the respondent's name and department, takes five minutes. And responses can be tracked.

### **The autofill feature can cut even more time off a survey.**

"The great thing that's so good about Key Survey is the ability to follow up so easily," said Trivedi. "Before, we had a tremendously difficult time trying to get people to complete surveys. Whereas

now it's very easy for me to send information to management, that these three individuals have not completed the survey. And usually within two hours, I have those surveys. That's a huge benefit from a people-management, a client-management, perspective."

Key Survey is helping LEVEL5 to manage other data, too. At the beginning of a project, they gather a great deal of statistical information from the client. In the past, paper records from the MIS systems would come, or the data would be given in one huge spreadsheet. And because nobody does a spreadsheet in the same way, the relevant numbers were often hidden amongst masses of irrelevant ones. It sometimes took Trivedi three hours or more to find the information he needed.

**Create a form with Key Survey. Sort the information you receive the way you want it.**

"Now I can create a survey that gets me the data I specifically want, and in the format that I want, so it goes directly into a spreadsheet. So, it's just a matter of cutting and pasting it and putting it into the right Excel data table that I'm using. That's saved us countless hours in looking for that data - the cost goes down and our price does not change. And of course, everyone's looking for as much margin as they can get."

**Trivedi was heavily impressed by Key Survey's service - even as a trial user.**

"I got the same level of support in the trial period that I got when I became a client, which is fantastic," he said. "I could call up and speak with Justin when I was going through and trying to set up a trial, and there was never any of this, 'gosh, you're just a trial user'. It helped to solidify our decision - if we were getting this level of service now, then... and it bore fruit, we got the same excellent service once we joined. I never once got the sense that anyone was impatient or upset with me for asking obvious questions. I wouldn't be where I am today in making it as quick and easy for myself were it not for that assistance."

**Key Survey's service is top-of-the-line. Get a Trial and see for yourself.**

Key Survey has saved the LEVEL5 team man-hours in the employee survey, adding to LEVEL5's margins and allowing him to focus on streamlining the company in other ways.

"Along with Key Survey, we're becoming a little more automated as we go to market," he said. "Some of the things that we do, I would call traditional or old-fashioned; now we're looking to automate and let the data work for us instead of working for the data. We're saving costs on paper, we're saving our clients costs on paper, which is tremendous. Productivity is great, but effectiveness, in, my mind, is a much better takeaway that Key Survey has given us. The ROI has been tremendous from our perspective."