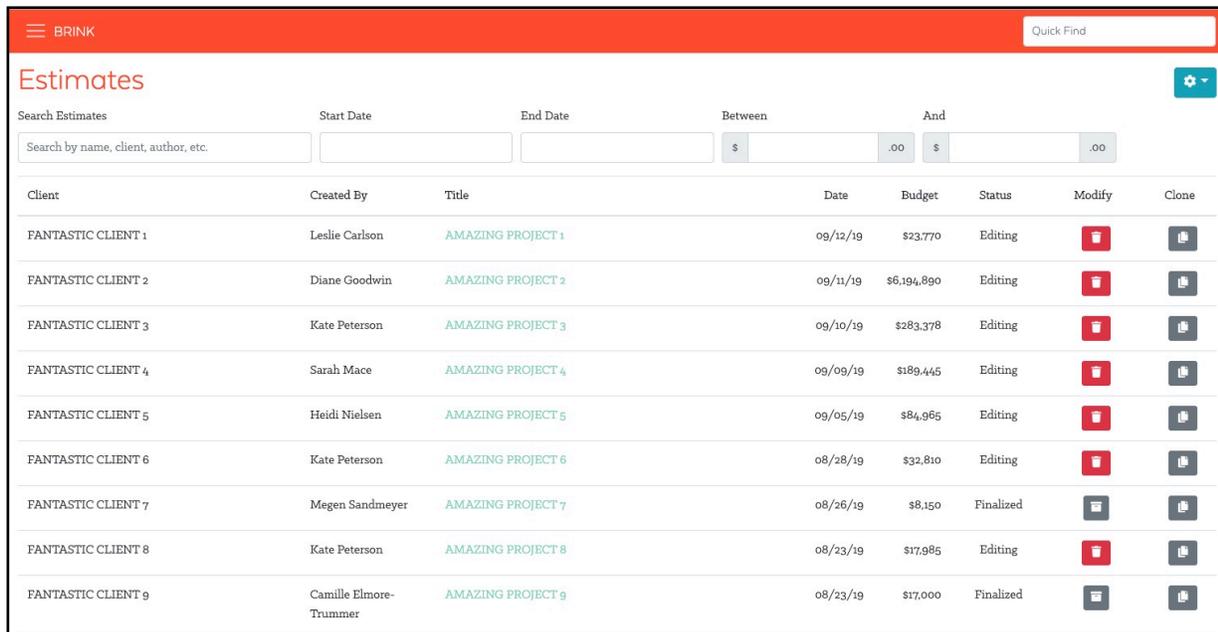


ACCELERATING BRINK IN 2019

As part of Accelerate Oregon¹ 2018, we partnered with BRINK Communications to develop a bespoke software application with the goal of significantly increasing the BRINK teams' efficiency; i.e., we wanted to save BRINK \$25,000+ in operating costs per year starting in 2019. After several discussions with the BRINK leadership team and research into BRINK's operation in November, we all agreed the best opportunity lay in revamping their estimation process.

This made sense for a few key reasons:

- 1) We felt there was very good potential to make an impact -- the process was time-consuming, complicated, and frequent.
- 2) There weren't viable ready-made solutions -- BRINK has several rate sets due to among other reasons; legacy long-term contracts, governmental work, and non-profit work. Finding a SaaS that fit their process (or was at least close to it) and met their needs wasn't possible.
- 3) We believed there would be additional benefits in terms of transparency, better utilization of prior art, consistent branding, and an overall improvement and codification of BRINK best-practices.



The screenshot displays the 'Estimates' section of the BRINK application. It features a search bar at the top left and a 'Quick Find' search box at the top right. Below the search bar, there are filters for 'Search Estimates', 'Start Date', 'End Date', 'Between', and 'And'. The main content is a table with the following columns: Client, Created By, Title, Date, Budget, Status, Modify, and Clone. The table contains 9 rows of data, each representing an estimate for a 'FANTASTIC CLIENT'.

Client	Created By	Title	Date	Budget	Status	Modify	Clone
FANTASTIC CLIENT 1	Leslie Carlson	AMAZING PROJECT 1	09/12/19	\$23,770	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 2	Diane Goodwin	AMAZING PROJECT 2	09/11/19	\$6,194,890	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 3	Kate Peterson	AMAZING PROJECT 3	09/10/19	\$283,378	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 4	Sarah Mace	AMAZING PROJECT 4	09/09/19	\$189,445	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 5	Heidi Nielsen	AMAZING PROJECT 5	09/05/19	\$84,965	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 6	Kate Peterson	AMAZING PROJECT 6	08/28/19	\$32,810	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 7	Megen Sandmeyer	AMAZING PROJECT 7	08/26/19	\$8,150	Finalized	[Trash]	[Clone]
FANTASTIC CLIENT 8	Kate Peterson	AMAZING PROJECT 8	08/23/19	\$17,985	Editing	[Trash]	[Clone]
FANTASTIC CLIENT 9	Camille Elmore-Trummer	AMAZING PROJECT 9	08/23/19	\$17,000	Finalized	[Trash]	[Clone]

A mockup of the final estimates application.

¹ Accelerate Oregon is an annual program for Oregon-based companies. The Sellwood Company sponsors \$25,000-\$50,000 of software development services on a high ROI project. Learn more at <https://accelerateoregon.com>.

THE WORK

The project itself was fairly straightforward; however, BRINK was enormously helpful in providing two excellent points of contact, access to their Project Managers (Subject Matter Experts), in addition to great Executive Team support. BRINK also gave us a number of example estimates from recent projects that let us see the flexibility we would need to cover as well as the professional aesthetics we would need to match. In short, BRINK supported our work on all fronts.

The screenshot shows a web-based interface for creating or editing an estimate. At the top, the title 'Estimate' is displayed in a large, light grey font. Below it, the client name 'Sellwood Company' is highlighted in red, followed by the user 'Tim Loudon'. A teal 'Editing' button with a gear icon is in the top right corner. The main title 'Accelerate Oregon' is in red, with the date 'September 15, 2019' and the author 'Prepared by Tim Loudon' below it. A short description reads 'A sample project. It's meta.' An 'Edit' button with a pencil icon is located below the description. The main content area is titled 'Phases + 📁' and contains a single phase named 'Promotion' in red, which is also marked as 'editable' and 'deletable'. Underneath the phase, there are sections for 'Description' (with the text 'Update website and put together case study. Talk with folks in the community about potential companies.'), 'Timeframes +' (with one item: 'September - October'), 'Key Tasks +' (with four items: 'Talk to R T', 'Get feedback from S S', 'Ask E M for potential companies', and 'Get quotation from L C'), and 'Deliverables +' (with three items: 'Completed Case Study', 'Updated Website', and '5-10 candidate companies'). Each item in the lists has a small menu icon, a pencil icon for editing, and a trash can icon for deletion.

A sample Estimate highlighting the visual nature of the application with drag-and-drop features and edit-in-place capabilities.

Toward the beginning of December, we came up with the following list of core deliverables:

- A flexible estimate structure that allowed for drag-and-drop movement of components with a modern edit-in-place UI for Microsoft Word-like editing and proposal writing complete with auto-saving functionality
- A simple to use and navigate site that lets BRINKsters search for estimates based on Client, PM, date, or budget
- A templating system to jumpstart projects with BRINK best-practices baked-in
- The ability to copy estimates in whole or part (independent of rate sets)
- Basic administration features (secure logins, permissions, and client/contact/employee creation)
- A revisioning process and estimate status; eg, estimates can be edited, finalized, signed, ready for revision, or archived
- BRINK branding with professional-looking copies of the estimates available to clients via magic links and PDFs
- Automated notifications to facilitate estimate revisions and digital signatures
- And the heart of the application: the budget builder, an Excel-inspired page that PMs can use to assign roles to phase, budget items, and calculate hours and budgets by role, budget item, phase, and see project totals all in real-time.

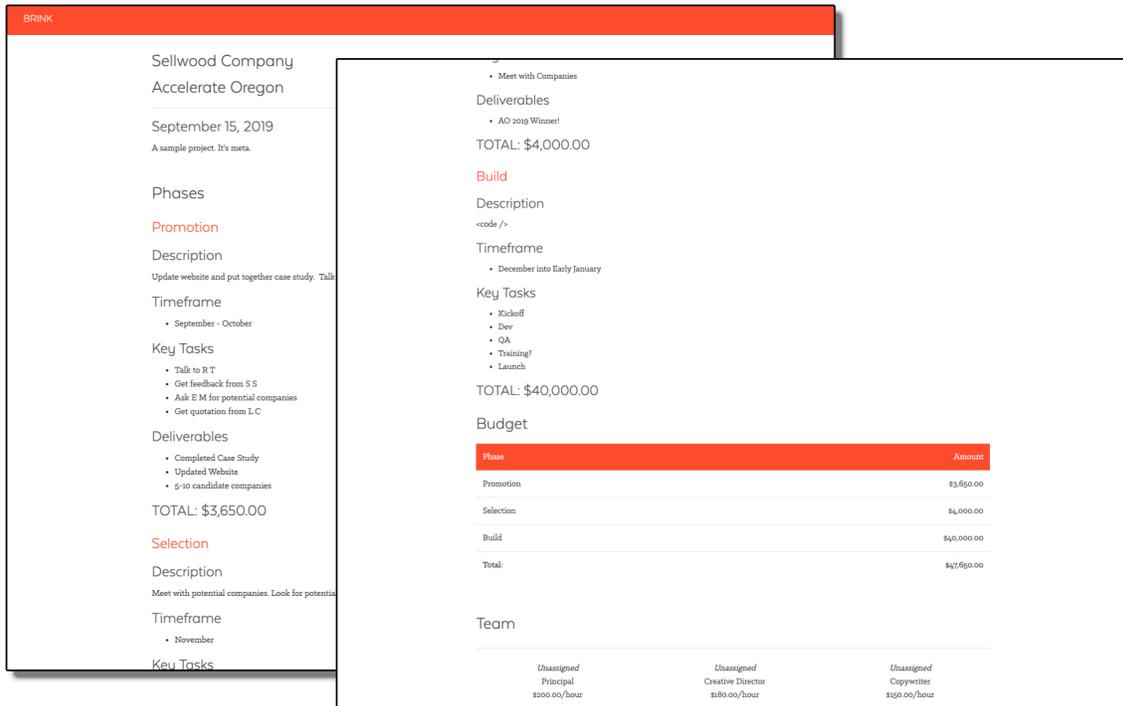
Budget Builder
Sellwood Company
Accelerate Oregon

Promotion ⓘ

Budget Item +	Expenses \$	Copywriter	Creative Director	Designer	Principal	Totals
☰ Write Case Study  		5.0				5.0
☰ Update Website  			5.0			5.0
☰ Meet with and email PDX folks  					10.0	10.0
Total Hours	—	5.0	5.0	0.0	10.0	20.0
Subtotal	\$0.00	\$750.00	\$900.00	\$0.00	\$2,000.00	\$3,650.00

A simplified version of the budget builder. A major win: BRINK staff can clone a project from last year or from a different sector, but use updated rates.

By early January, we had finished our initial work. We reserved some budget for revisions and gave the BRINK team several weeks to test the application with sample estimates. After minor revisions and QA, we met more BRINKsters for on-site training in March, just before we officially launched the app. Meeting with the BRINK team was such a positive and rewarding experience—easily the highlight of our project. It is one thing to plan and project \$25,000 in time-savings; but it's quite another when you hear someone say, "That's going to cut my time in half!"



A sample of the final product.

THE IMPACT

From our perspective, the project was an absolute win: we anticipate this will save BRINK \$50,000+ over the next couple of years². Per usual, BRINK says it best:

“The estimating software we received through Accelerate Oregon has been a game-changer for us. First, there’s the significant time and money savings from being able to prepare professional estimates for client projects efficiently. Second, having client and project estimates in one application gives our staff the ability to apply learning from one project into the scope and work of a new project, giving our clients the benefit of all the best practices we’ve developed over time. It’s easily the most valuable piece of software we use.”

BRINK Principal, Leslie Carlson

² BRINK continues to grow by leaps and bounds every year; savings should increase proportionately with headcount. General software maintenance costs are included in these calculations (roughly \$1,200 annually).