iCap Equity scales and grows with Nintex Workflow Cloud

Pacific Northwest equity firm automates and streamlines key business processes with Nintex Workflow Cloud.

Organization
iCap Equity

Website
www.icapequity.com

Industry
Financial Services

Country
United States

Business situation
Manual processes and disparate content platforms bogged down the field project manager during site inspections.

Solution
Nintex partner Provoke Solutions developed a solution using Nintex Workflow Cloud to automate cross platform management of site inspection reports via mobile devices, Box and Microsoft Dynamics CRM.

Benefits
Cut by 50% the time required to manage and share site inspection data throughout organization

Deliver accurate data more quickly for agile project management and better business outcomes

Enable business to grow and scale at iCap Equity's preferred pace

Equipping staff with cloud-based tools for productivity

"With Nintex Workflow Cloud, we're able to act on our business goals and deliver powerful results."

— **Jim Christensen**, Chief Operating Officer, iCap Equity

Equity and construction firm iCap Equity is positioned for strong growth but wants to be certain of achieving it. That's why it streamlined technology platforms and automated key processes, like site inspection reports, using Nintex Workflow Cloud.

How does one of the hottest companies in an even hotter real-estate market ensure its continued growth? For iCap Equity, an investment capital fund focused on equity investments for real estate development and construction, one way is to quickly automate repetitive business processes that otherwise keep its people from doing their best work. Technology-savvy and innovation-minded, iCap Equity equips its people with cloud-based tools like Box, Office 365 and Microsoft Dynamics CRM.

One last obstacle kept them from enjoying the full advantages of being a digital business: Their dependence on multiple disparate systems to complete tasks. To fully leverage the cloud, iCap Equity turned to Nintex partner Provoke Solutions to build a Nintex Workflow Cloud solution that connects information across diverse systems and repositories through the power of Nintex's workflow and content automation technology.

Manual processes limit speed and strategic outcomes

Before Provoke Solutions whipped out their designs for a workflow solution, they first addressed the technology burdens facing iCap Equity team members. They kicked off discovery with Francis Rzegocki, Development Manager at iCap Equity. His role involves processes that provided a compelling business case for Nintex Workflow Cloud.

As a Project Manager, Rzegocki is responsible for capturing real estate development site reports for the executive leadership team who ensure that projects align with scope and financial forecasts. Before using Nintex Workflow Cloud, he shuttled among 40-50 active projects each month to capture site inspection reports and images on his tablet. He would prevent projects from blurring into each other by snapping a picture of his steering wheel as an image separator. Back at the iCap Equity office, he uploaded all data to Box for organizational visibility.

He then had to copy the same data into Microsoft Dynamics CRM so the executive leadership team could monitor investments. Despite Rzegocki's best efforts, working with disparate tools made it very challenging to carefully monitor critical real estate development projects.

Calling for an end to manual processes

iCap Equity called on their Nintex partner, Provoke Solutions, to imagine their ideal solution. Provoke's Senior Account Manager, Simon Low, highlighted the first requirement: "A workflow platform directed towards the cloud market… [that] wouldn't hold them back" from collaborating on content across multiple cloud-based platforms.

Nintex Workflow Cloud emerged as the optimal choice to build an intuitive and intelligent workflow solution that emphasized efficiency and enabled repeatability.

In fact, the solution aligns with iCap Equity's work rhythm. An integration with Progressive Web App enables Rzegocki to capture site inspection reports and attach images and documents. After he completes the form by marking meta-data, he taps "Submit" on his device and Nintex Workflow Cloud takes charge of next steps. Nintex Workflow Cloud recognizes meta-data, so if a document is labeled field inspection, it is automatically uploaded to the field inspection folder in Box and Microsoft Dynamics CRM. Team members receive an email notification alerting them to available reports. For iCap Equity, Nintex Workflow Cloud delivers the ability to take control of workflow challenges from end-to-end without so much as a tap on a mobile device.

Saving 50% of task time

Now, things are different for Rzegocki—and iCap Equity—because of Nintex Workflow Cloud.

"I've cut 50% of the time I used to spend managing uploads. That makes a huge difference. I can spend more time analyzing information and understanding the full status of our projects, so we can make better decisions," says Rzegocki.

With a smile of relief, he adds: "And I don't take any more photos of my steering wheel."

Multiply Rzegocki's experience by the number of employees at iCap and you can see the value iCap receives from Nintex Workflow Cloud

Powerful results

"With Nintex Workflow Cloud, we're able to act on our business goals and deliver powerful results," says Jim Christensen, iCap's Chief Operating Officer. "We take action faster. We fund more wisely. We save money by reducing risk. We can scale our business at our own pace. For example, we're getting ready to launch a new fund that will be bigger and require more resources to manage. Nintex Workflow Cloud will help free up the resources to make this possible."

For Provoke, Nintex Workflow Cloud is a critical tool to empower more clients like iCap, on more systems and platforms, with more types of solutions.

"By enabling us to take full advantage of the cloud for workflow, Nintex Workflow Cloud will do more than help transform our clients' businesses," says Simon Low, Senior Account Manager, Provoke Solutions. "It will help transform ours, too."

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting **www.nintex.com** and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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