



## **A Case Study**

### **Lockheed Martin Aerospace**

Lockheed contracted Active Innovations, Inc. to implement InfoRouter in order to resolve issues they faced in managing massive amounts of documents and graphic images generated in a proposal setting.

The Proposal Development Department was in charge of creating massive proposals to the different branches of the U.S. Armed Forces, various government entities and countries around the world.

InfoRouter was piloted at Lockheed on a proposal to the U.S Navy for the Avionics Modernization Program (AMP). This project involved the replacement of the cockpit avionics components of 300 C130J planes. The cost of the program was 2.5 Billion U.S. Dollars.

The proposal consisted of 55,000 documents with approximately 70,000 graphic images.

The proposal team consisted of 200 aerospace engineers, 20 graphic artists, 30 support staff and 17 proposal directors who worked in excess of a year to complete the proposal project.

In an environment where correct document versioning and control is mission critical, effective management of the vast number of documents, graphics and authors was a must. Lockheed Martin Aerospace understood the importance of this task and decided to implement an electronic document management system to help in this task. The chosen application was InfoRouter.

InfoRouter at the time was at Version 1.0. Although there were 10 or so sites using it [at the time], it lacked some of the advanced features that Lockheed Martin needed. This prompted a wide base interview process of Proposal Development Department staff to understand the complex structure they had created to develop proposals.

Working closely with key staff members, Active Innovations, Inc. implemented over 30 new features [each identified as cost saving features] over a 6 month period.

Over the years, Active Innovations, Inc. has preferred a partnership approach, seeking customer input on every enhancement idea. Through periodic inquiries, Active Innovations, Inc. has asked for new ideas, time saving features from their existing client base as well as compiling list of questions submitted by potential clients. Effective management of such feedback has lead to numerous features in InfoRouter today.



## **Conclusions:**

### **Prior Process**

- Hard to control schedule discipline
  - Unable to enforce review schedules
  - Unable to enforce check-out/check-in rules
- Three systems used for tracking document status (Art & Text)
  - Manual graphics request and delivery process
- Time wasted in transporting material between groups
  - Manual graphics request and delivery process
- Document version to integrate into final proposal is lost
  - Approved versus Draft versions not clearly identified or wrong version is included in final proposal
- Lack of Document Security and Change Control
  - Unable to manage Access and changes to documents
  - No approved version lock-down facility
  - No notification of change
- Physical Location Restrictions
  - Staff flown from different Lockheed Martin locations

### **Improved Process after InfoRouter Implementation**

- Authority for directing and controlling the proposal process
  - Folder based rules to enforce schedules
  - Schedule enforcing tools
  - Single point of control was made possible
- One system for tracking throughout process in all areas/steps
  - Custom fields used to map to internal numbering schemes
  - Single point project status checking
- Automatic distribution for document Review / Comment / Approval
  - Automatic Change notification system resulted in huge improvement in project control.
- Direct On-line Monitoring for all documents
  - On-line monitoring, review and comment mechanisms resulted in cost and time savings in project management and control.
- Implemented for major proposal (\$2.5B+) On 100 PCs and won contract.
- Entire teams of authors can now work remotely.
  - Saved un-disclosed amount of money on travel and lodging costs



- Total Control over document security and Change Control
  - No documents outside of InfoRouter was taken into consideration
  - All documents were individually tracked and approved prior to inclusion
  - All changes were instantly communicated to key proposal administrators
  
- Outside Vendor Control and Management
  - Secure Domains and folders were created for outside vendors. Vendors uploaded and downloaded outsourced graphic images without being exposed to proposal content.
  - All vendor activity was effectively monitored. New or changed documents were communicated to both parties via the automatic notification process in InfoRouter (Subscription Notifications)