

Case study
Engineering/construction

Partner ESI

Faster inspections at scale

Partner ESI completes 67% more
inspections per day with Fulcrum





About the client

Partner Engineering and Science, Inc. (Partner ESI) is a leading provider of engineering, environmental, construction, energy, and valuation consulting for the commercial real estate industry. With a deep bench of multidisciplinary experts, Partner ESI offers a collaborative, client-focused experience and deliverables. This commitment to understanding and aligning with client objectives has made it a trusted partner in helping businesses manage risk, optimize asset performance, and succeed in its real estate strategies.

Introduction

When California's SB 721 mandated a law to inspect exterior elevated elements (EEE) (i.e., balconies, decks, stairs, etc.) came into effect, Partner ESI's clients faced an overwhelming new challenge. The law requires detailed inspections and comprehensive reports for EEEs at multifamily residential buildings, creating significant pressure to meet new compliance standards. This surge in demand meant Partner ESI had to manage an immense amount of data and documentation, all while ensuring accuracy and consistency.

"We were spending weeks organizing thousands of photos and manually building reports," recalls Josh McCullough, Technology Product Manager at Partner ESI. "It created inefficiencies and made tracking everything much harder."

For Thomas Narciso, PE, Technical Lead of Construction Cost Estimates, the process presented clear frustrations. "It was difficult for engineers to manage and track all of the data captured while on site. When back at the office, they'd have to transcribe the paper field notes, rename photos, and try to recreate things in their heads," he explains.

Partner ESI's reliance on manual workflows made the growing demand from its clients even more challenging. The time-consuming nature of these processes underscored the need for a more efficient, reliable system.

Transition to Fulcrum

As operations scaled up, the need for efficient field data collection and instant access to that information off-site became critical. The transition to Fulcrum marked a turning point for Partner ESI. While the team faced challenges adapting to a new system, Fulcrum quickly proved its value in simplifying workflows and increasing efficiency.

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Thomas Narciso, PE

Technical Lead of Construction Cost Estimates

“It started out with just one guy,” recalls Narciso, referring to how the balcony inspection team first began using Fulcrum. “We had a very specific need to take a lot of photos and pin them to a specific inspection. At first, we were figuring it out as we went.”

After the initial learning curve, the system’s intuitive features allowed Partner ESI to scale quickly. The team grew from one early adopter to a group of twenty, all leveraging Fulcrum for field inspections. “We trained people quickly, even those who weren’t tech-savvy,” Narciso explains. “It’s down to an hour crash course now.”

This straightforward onboarding process made it easier to scale Fulcrum’s usage across different teams. “Fulcrum works because it isn’t overly complicated,” says McCullough. “Anyone can learn it and use it effectively.”

Improvements with Fulcrum

From simplifying inspection notes from the field professionals and photo management to automating reporting and improving data recall, Fulcrum transformed how Partner ESI’s teams work and deliver value to their clients.

Scaling operations while maximizing productivity

Fulcrum fundamentally changed how much Partner ESI could accomplish in a day. By streamlining workflows and minimizing

inefficiencies, the platform enables Partner ESI to scale its operations significantly.

“When we first started, a crew could only do 15 inspections a day on average. Now we can do 25 or more,” says Narciso. “It’s a massive improvement that lets us keep our schedules full and deliver on time.”

This increase in efficiency not only allows Partner ESI to handle more projects but also helps it stay competitive. Since implementing Fulcrum for field data collection, productivity has increased, and teams are delivering higher-quality results. “Our client deliverables depend on timeliness and quality. Fulcrum helps our team achieve those goals consistently,” explains Narciso.

By cutting down redundant tasks and optimizing fieldwork, Partner ESI can scale its operations to complete more inspections each day and confidently take on a growing workload.

Streamlined workflows and enhanced accuracy

Fulcrum’s no-code application builder, along with its adaptability and customization, enables Partner ESI technical professionals to quickly tailor the platform to their specific needs. By tailoring the app’s functionality, Partner ESI eliminated unnecessary steps, minimized errors, and ensured consistent data collection across teams.

“We’ve gotten to a point where the app is fast and it doesn’t bog us down in the field,” says Narciso. “It works the way we need it to, so we’re not wasting time clicking through unnecessary steps.”

Fulcrum's flexibility also enables automation of repetitive tasks, saving time for inspectors in the field. "We created a calculation field that automatically transfers data from dropdown lists to the opinion section," explains Narciso. "This lets the inspectors focus on adding detailed comments instead of re-entering information."

The platform's automation also reduces errors during inspections. "The dropdowns and automations make it so much easier to stay consistent and reduce mistakes," Narciso adds.

These customizations optimize fieldwork processes and improve data integrity, enabling teams to complete inspections more efficiently while maintaining data accuracy and consistency.

Audio FastFill: Boosting efficiency and detail in the field

Partner ESI was one of the first users of Fulcrum's innovative Audio FastFill for simplifying data entry during inspections. With this feature, the field professionals can speak their observations naturally while the system captures detailed, structured, multi-field input automatically. By reducing the reliance on manual typing, Audio FastFill allows teams to focus on the inspection itself, not the mechanics of data entry.

"Before, I was getting descriptions that were three words long because it can be a hassle to type everything out," says McCullough. "With Audio FastFill, inspectors can speak normally, and I'm getting paragraphs. It's easier to record longer observations with the ability to pause the audio capture and upload multiple audio recordings if needed. As a result, we're getting much better analyses."

For inspectors who aren't comfortable typing out detailed notes on a phone or tablet, Audio FastFill bridges the gap. "The younger people who grew up with phones and can text faster than they type, they've always been very receptive to Fulcrum. Audio FastFill provides a simple way for those who don't like typing to share what they're seeing, and have it correlate to different fields if the teams aren't sure where the data should be captured," McCullough explains.

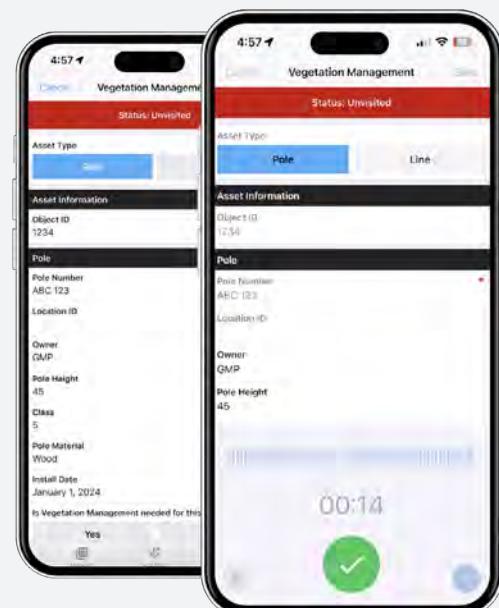
Audio FastFill has also been well-received by experienced inspectors. "The feedback I'm getting from some of our more seasoned inspectors is they are loving the feature," McCullough notes.

"It helps them focus on the inspection itself and provide more detailed, professional observations rather than using short phrases and various acronyms while entering notes."

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PARTNER
Engineering and Science, Inc.

Josh McCullough
Technology Product Manager





Although it is a new feature, Audio FastFill has already become an important tool for Partner ESI, enabling inspectors to capture more meaningful data while saving time. By allowing natural speech input and reducing the burden of typing, the feature has brought new depth and efficiency to inspections.

Simplified photo management

Managing thousands of photos captured and stored in a loose camera roll during inspections was one of the most time-consuming tasks for Partner ESI's engineers. Fulcrum transformed this process by automating photo organization and linking images directly to specific inspection items.

"The automatic titling of pictures is awesome," says Narciso. "It's one of the most powerful features in my line of work, and we use it all the time."

Fulcrum's centralized access to photos ensures that teams can track and verify data effortlessly. "If a client brings something up months or even years later, we can quickly pull up the photos and know exactly what they're talking about," Narciso explains. "It lets us pick up the conversation as if nothing had paused because we have all the information right in front of us."

Streamlined reporting

Before Fulcrum, engineers spent weeks compiling photos, observations, and findings into detailed reports. "Originally, our inspectors would spend sometimes two or three weeks writing up reports," recalls Narciso.

By using Fulcrum to export field data into Excel or other formats and generate reports, teams have significantly reduced office work. The report builder tools allow for tabular reports to be auto-generated and ready as soon as the surveyor uploads the field collected data. The tabular reports compile checklist data, free-form inspection findings, and additional notes, with corresponding photos embedded to create a real-time summary that's ready for delivery at the push of a button. "Fulcrum streamlines the process so the report is essentially done by the time the fieldwork is complete," says Narciso.

Clients also took notice of the professionalism Fulcrum brought to Partner ESI's deliverables. "Our clients love the aesthetic look of the PDFs, and how the reports are organized and branded," says Narciso. By customizing the color palette and incorporating the company logo, teams supplement

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Josh McCullough
Technology Product Manager

their technical findings with Fulcrum-generated reports to create a comprehensive deliverable that exceeds expectations.

The switch to Fulcrum allows Partner ESI to produce accurate, detailed reports while maintaining existing workflows. The platform's seamless integration ensures that field data flows directly into polished, client-ready reports, eliminating manual compilation and reducing turnaround time without disrupting established processes.

Automated workflows and task tracking

Fulcrum's automation capabilities go beyond simplifying data collection. They also streamline how tasks are assigned and managed. For Partner ESI, automated workflows have improved communication and accountability across teams, ensuring that important items are flagged and handled efficiently.

“If the inspector notes there's an item of concern, we can trigger a follow-up using the workflow feature in Fulcrum,” says McCullough. “By adding and adjusting the filters, we can send a different notification to a licensed structural engineer. Before Fulcrum, it was manual and much more difficult to track. Now, it all happens in real time.”

This automation allows Partner ESI to notify the right team members as soon as the record is uploaded, reducing delays and allowing teams to address critical issues promptly.

Data recall and transparency

For Partner ESI, tracking and accessing inspection data over months or even years is critical for ensuring compliance and providing clients with the transparency they expect. Fulcrum's centralized system makes it easy to retrieve past reports and inspection details whenever needed.

“We often have to revisit inspections long after they're completed,” explains Narciso. “By then, our professionals may have been to dozens of other properties and assessed hundreds of other balconies, making it difficult to recall details at one given site or at one specific balcony. It's not unusual for clients to ask us to pull up data from two years ago for repairs or ask us to review something we flagged earlier.”

This ability to track and validate old data also proves invaluable for resolving disputes. “We've had situations where someone tried to discredit our work, but we could retrieve the exact photos and data to back ourselves up,” says Narciso. “It protected us and let us pick up the discussion as if nothing had paused.”

Clients also rely on Partner ESI's ability to compare flagged issues or repairs with past inspections. “We fast reference reports all the time,” says Narciso. “Clients want us to look at something we flagged years ago and compare it to what's been repaired.”

Fulcrum's robust data structure capabilities ensure that Partner ESI consistently meets client expectations for transparency and accuracy.

Whether revisiting past findings, validating completed repairs, or defending its work, the platform provides a reliable, organized foundation that saves time and instills confidence.

Meeting compliance requirements with ease

California's SB 721 mandate created significant challenges for firms like Partner ESI, requiring detailed reports for every EEE inspected. Instead of a single cover letter or a general summary, the law demands individual reports with photos, GPS data, and thorough descriptions for each structure. "We have to generate a report for each individual EEE. That's a big ask for our engineers," explains Narciso.

Fulcrum's automated reporting and data organization tools enable Partner ESI to meet these demands without overburdening its staff. By integrating GPS data, photos, and detailed notes into seamless, report-ready outputs, Fulcrum improves efficiency while saving time and effort.

Transforming team dynamics and recruitment

Before adopting Fulcrum, technical staff often spent hours on repetitive clerical tasks like compiling reports and organizing data. Automating these processes allowed inspectors to focus on higher-value activities, improving their overall experience. "It blew their minds how much easier Fulcrum made their jobs," says Narciso.

Fulcrum even gave Partner ESI an unexpected edge in recruitment. "Once we started using Fulcrum and showed our teams how easy it was, we were able to attract more inspectors," explains Narciso. "It helps with recruitment because people see how manageable the work is."

By eliminating the burden of repetitive, manual tasks, Fulcrum improves team morale and makes it easier for Partner ESI to scale its workforce. These benefits extend beyond productivity, helping the company overcome the significant challenges recruiters face in attracting and retaining skilled engineers in a competitive job market.

Conclusion

Fulcrum has become an indispensable tool for Partner ESI, transforming not only how it does work in the field but also how it delivers results to its clients. From streamlined reporting to improved accuracy and scalability, the platform addresses critical pain points across its operations.

"It isn't just one thing. Fulcrum saves time across the board, whether it's in the field, writing reports, or just keeping things organized," says McCullough.

The clarity Fulcrum brings to Partner ESI's processes is just as important. "Fulcrum gives us confidence," adds Narciso. "It makes us more organized and puts us in control of everything we are doing."

By working with Fulcrum, Partner ESI has enhanced its ability to deliver the exceptional outcomes its clients rely on. Fulcrum empowers Partner ESI's teams to work smarter, accomplish more, and maintain the highest standards of quality, demonstrating what's possible when innovation and expertise align.

Ready to create your own digital transformation success story?

Contact us for a no-obligation chat to get started today!