Keeping consulting customers up to speed on project progress isn’t always easy — especially when your team is geographically distributed and each project might involve dozens of complex tasks. For Ingredient Identity, a consulting firm in the heavily regulated dietary supplement industry, a project management application built on Intuit QuickBase enables more efficient collaboration across multiple teams and transparent reporting to keep its customers in the loop. With role-based permissions and automated progress reports, Ingredient Identity delivers a level of service to its clients that the competition can’t match.
About Ingredient Identity
Ingredient Identity is a regulatory management consulting firm that helps companies improve and ensure the quality of natural products while meeting FDA requirements for Current Good Manufacturing Practices.

The Challenge
- Manual management of project progress with spreadsheets and email
- “Dropped” tasks creating inefficiency
- No real-time visibility into project progress
- Clients unsure of where budget is spent

The Solution
- Intuit QuickBase project management application
- Tasks created, prioritized, and assigned within application
- Automated workflows enable collaboration
- Documents and time cards stored within app to ensure transparency and up-to-date information
- Regular automated reporting on project progress
- Custom roles and permissions allow maximum transparency for clients

The Results
- Faster, more efficient project delivery
- Zero dropped tasks
- Transparent reporting on project progress makes clients happier
- Streamlined billing practices
As a consulting firm in a heavily regulated field, Ingredient Identity specializes in navigating complexity. The company helps ingredient suppliers, dietary supplement manufacturers, distributors and retailers optimize their quality and regulatory programs in order to meet Food & Drug Administration requirements.

When it came to managing the complexity of its own projects, however, Ingredient Identity needed a solution that would not only store and track tasks and activities across a broad team of consultants and specialists, but also provide reliable, real-time visibility into project progress to Ingredient Identity's clients. The solution was a project management application built on Intuit QuickBase that gives Ingredient Identity an advantage over the competition.

"As a consulting practice, we need to maintain transparency in our projects. The ability to add time cards to tasks and print weekly activity reports for our clients has been very advantageous," says Brandon Griffin, CEO of Ingredient Identity.

**Regulatory Challenges Require Smart Management**

Dietary supplement manufacturers and marketers exist in a complex regulatory environment. Every product — and every ingredient — is subject to Food & Drug Administration rules for manufacturing, packaging, labeling and distributing. Ingredient Identity works with a wide range of companies to ensure they can rapidly achieve, sustain, or regain compliance with those regulations.

Many of these consulting projects can be very complex — with numerous team members involved across different departments and all with critical deadlines. Input may be funneled from different teams, and then qualified into tasks that are then assigned based on the matching skill set and availability of any number of Ingredient Identity's staff.

When evaluating a solution to help manage complex projects, Griffin sought out software that was easy to use, highly customizable, and accessible from any device on any network. After evaluating multiple options — including Microsoft Project, Smartsheet, and Podio — Griffin selected QuickBase for its ability to deliver a flexible system that could be configured to meet its exact needs.

**Tracking and Showcasing Project Progress**

Within the QuickBase app, Ingredient Identity leadership can identify, prioritize, and refine tasks quickly for a new project. All documents associated with the current project can be stored, reviewed, and tracked, and changes to certain fields or forms can trigger notifications to keep the project flowing smoothly from beginning to end. This allows Ingredient Identities widely distributed team of consultants and specialists to collaborate more effectively.

It also enables Ingredient Identity to give customers real-time visibility into project progress. Because QuickBase allows for granular role-based access settings, Ingredient Identity can automate the process of reporting on project progress to its clients. Weekly reports are automatically generated to keep the client in the loop on where the project stands, and what billable activities have been completed in the service of the project.

"As our team members add billable hours, they associate their time cards with those tasks, which is wonderful. We then generate a weekly activity report that goes out to the client for that time frame and reaffirms our progress or key achievements either during our weekly meetings with the client or at the conclusion of a project," says Griffin. "It's a huge advantage for the clients and us alike."

Already Ingredient Identity is seeing value in managing projects in a flexible, transparent way. “Dropped” tasks are already a thing of the past, says Griffin, and the ability to report directly to clients on project activities has proven a competitive advantage. Creating and keeping happy clients in a complex environment just got a little bit easier.