

Building an Offshore Drafting & Estimating Division for a Leading Fire-Rated Systems Manufacturer

Challenge Presented

A U.S. manufacturer of fire-rated glass and framing systems partnered with Intelassist to explore how offshore support could strengthen efficiency and streamline production workflows. At the time, operational processes were largely manual, and formal SOPs or training documents had not yet been established. Intelassist introduced structured documentation, formalized workflows, and a fast-turnaround model, including 24-hour estimating support, that ultimately enhanced the client's responsiveness and laid the groundwork for scalable growth.

Engineering, Drafting & Sales Support Services

Solution

Wholesale Building Materials

Industry

51-200 employees

Company size

65 employees

Employees provided

I. Initial Assessment & Early Operational Needs

The partnership began in 2009 with a three-person pilot team supporting data mining and basic AutoCAD/3D drafting. During the assessment phase, Intelassist identified several structural challenges:

- No formal training manuals or documented workflows
- Estimating performed entirely through manual Excel formulas
- Limited definitions for product terminology and fire-rated classifications
- Reliance on email exchanges for knowledge transfer
- Early-stage adoption of software like Revit

Intelassist's initial focus was understanding the client's product line, technical requirements, turnaround expectations, and the specific bottlenecks affecting accuracy and speed.

II. Process Development & Operational Framework

As demand increased, Intelassist began constructing the operational foundation required for a scalable and error-resistant workflow. This phase included:

Standardization & Documentation

Intelassist developed the client's first comprehensive SOP ecosystem, including drafting standards, estimating guidelines, terminology libraries, rules documentation, and process flowcharts. Every new directive from U.S. teams

was systematically captured and entered into a growing knowledge base.

Quality Assurance Structure

To support accuracy in a high-volume environment, Intelassist instituted:

- A peer-review "buddy" QA system
- Internal checklists for estimating and drafting
- Multi-step verification processes
- Automated Excel tools incorporating formula logic, zip code rules, and sales rep routing

Workflow Transformation

Intelassist introduced complexity levels for both drafting and estimating, enabling consistent task assignment and predictable onboarding timelines. This turned previously manual workflows into structured, scalable processes capable of supporting growing production demands.

III. Workforce Expansion & Talent Specialization

With strong processes in place, the client began expanding its offshore division. Intelassist grew the team with licensed architects, additional estimators, drafting specialists, data miners, and sales support associates. The scope evolved from simple drafting and data mining into:

III. Workforce Expansion & Talent Specialization (cont'd.)

- High-volume estimating
- Multi-complexity drafting (level 1 through level 5)
- Sales support operations
- Detailed data mining and documentation

By 2016, this team had become a multi-disciplinary unit supporting a wide range of architectural/engineering/construction (AEC), production, and operational functions.

Intelassist also developed tailored training pathways:

- Estimators: 1-month onboarding, escalating complexity under QA oversight
- Drafters: 3-month training for complexity 1 drawings, progressing to higher complexity by month six
- Sales & Data Operations: 1-month onboarding plus side-by-side coaching

This ensured predictable skill progression and reduced onboarding risk as the team scaled.

IV. Collaborative Governance & Integration with Client Leadership

To maintain alignment and ensure transparency, the partnership adopted a structured governance model:

- **Weekly** internal Intelassist reviews for workflow coordination and technical alignment
- **Monthly** meetings with client leadership including operations, sales, and executive stakeholders
- **Daily** technical clarifications between leads to maintain turnaround consistency

Between 2012 and 2016, onsite client visits further strengthened alignment, enabling deeper technical immersion and a clearer understanding of operational context. These efforts ensured that the offshore division was fully integrated into the client's broader operational ecosystem.

V. A Fully Integrated Offshore Support Division

Today, the offshore team at Intelassist functions as a comprehensive extension of the client's operations:

- More than 60 trained specialists across drafting, estimating, engineering, sales support, and data operations
- 1,000-1,400 quotes processed per month, consistently meeting 24-hour turnaround standards
- A highly tenured workforce, with many team members serving 5+ years
- A complete, living SOP and QA ecosystem
- Strong leadership practices emphasizing stability, retention, and continuous improvement

This integrated division supports approximately \$4M+ in monthly sales output and plays a core role in the client's market dominance in fire-rated glazing systems.

Timeline of Events

2009

Foundation

- Three-person pilot team launched
- Support included data mining and basic drafting
- Knowledge transfer primarily through email
- Early-stage Revit adoption identified as a technical challenge

2010–2012

Standardization Begins

- First SOPs, rule definitions, and drafting/estimating guidelines created
- Introduction of QA checklists and internal verification
- Automated Excel estimating tools developed
- First formal U.S. client visit in 2012

2013–2016

Workforce Expansion

- Growth to ~10 specialists (estimators + drafters)
- Task complexity levels introduced
- Enhanced adoption of structured governance and communication
- Volume reached ~400 quotes per day manually

2016–2019

Deep Integration

- Offshore team members visited U.S. facilities for immersion and alignment
- Expanded roles added: sales support, data mining, admin tasks
- Increasing drafting complexity levels (1 to 2)

2020–Present

Offshore Center of Excellence

- Team expanded to 60+ specialists
- 1,000–1,400 quotes processed monthly
- Mature hybrid model with strong retention
- Offshore division becomes core to client's market leadership

Conclusion

Over 15 years, Intelassist transformed a small pilot initiative into a fully developed offshore AEC support division. Through disciplined process creation, structured training, leadership stability, and deep cross-functional integration, Intelassist enabled the client to scale efficiently, improve accuracy, and maintain industry-leading responsiveness. This partnership continues to support the client's operational strength and long-term market leadership.