



## CASE STUDY

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MSI, A Tetra Tech Company, is a consulting firm specializing in international development services, including activity monitoring in conflict zones, for clients like the United States Agency for International Development, the U.S. Department of State, and the U.S. Department of Defense.

As a firm that finds itself in remote, and often dangerous, parts of the world, MSI seeks to be the eyes on the ground for its clients to inspect the results of their investments, ensuring that their money is being spent as directed and that projects are moving along.



## The Problem

Field-based teams face many challenges operating in the diverse range of international environments in which MSI works. For instance, remote regions often lack mobile networks, or lack of infrastructure might make it impossible to find critical locations. When teams arrive, surveys need to be conducted in multiple local languages. Teams may face challenges with local authorities who might be suspicious of activities. Finally, frequently changing inspection criteria and client information requests require field teams to rapidly pivot and shift priorities.

To overcome some of these challenges, MSI put Fulcrum to task to streamline inspection processes and allow for quick and easy onboarding of staff with features like preloaded maps in remote locations, the ability to store data offline in areas without mobile networks for later synchronization, and allowing for complex client follow-on reporting and analytical functions. **Fulcrum delivered.**



## The Solution

*“We take the client’s reporting requirements, and using that, we work backwards. We start with a monitoring plan that will get us the information the client needs and then create the data collection tools to get that information,”* says Tim Shifflett, Deputy Director of Client Solutions.

Using Fulcrum to manage field inspection for activity monitoring enables MSI to quickly train enumerator staff on the ground to perform the inspection tasks in very difficult environments. The intuitive user interface allows training to focus on the content of the data collection form, rather than on how to use the application. Similarly, as reporting requirements change, Fulcrum lets project staff adjust data collection forms without needing to be technology experts, creating a more adaptable and responsive monitoring system.

Fulcrum’s ease of use enables remote workers to use the monitoring processes on their handheld devices, in any language needed. The enumerators can become proficient in the monitoring process and mobilize quickly for projects, whether smaller projects that last a few weeks or long-term studies that take place over the course of many years. Even when enumerators move on, Fulcrum’s easy hand-off and onboarding means that a new enumerator can pick up right where the last one left off for project and data continuity.

The data MSI collects, augmented by images and video where desired, is only the first step of the monitoring process. MSI performs various follow-on activities through backend applications via Fulcrum’s API and webhooks, making full use of information collected to generate reports, visualizations, and other analyses and evaluations needed to gauge the effectiveness of client interventions.

*“Fulcrum is our go-to because we don’t have to worry about the technology. We know that it will work. We can just worry about everything else.”*

—Tim Shifflett  
Deputy Director of Client  
Solutions



## The Result

Shifflett says, *“Fulcrum is our go-to because we don’t have to worry about the technology. We know that it will work. We can just worry about everything else.”* With so many other things to worry about, such as the weather, physical security, and government instability, projects are far less stressful when you can count on the technology.

This translates to reliability and security in the real, and sometimes extremely remote, world. MSI’s work benefits from Fulcrum’s ability to serve offline custom base maps and geolocation scripts that enumerators can cross reference with geographical landmarks to get to the right place, even in exceptionally remote areas without roads or any traditional means of geolocation.

For MSI, using Fulcrum means that more of the day-to-day tasks can be handled by local project staff that are closer to the client and project, creating an adaptable and responsive monitoring system. Fulcrum eliminates costly do-overs as well as time wasted in the field looking for a location. Finally, Fulcrum’s integration with MSI’s internal applications minimizes manual work to ensure the MSI’s clients have what they need to assess their projects and analyze results.

**Discover for yourself how the Fulcrum’s field inspection management platform improves team performance by digitizing inspections, automating issue and task management, and delivering higher-quality, more complete inspection data. Sign up today for our [30-day free trial!](#)**

