



MORPHEUS

CASE STUDY



DBSI Streamlines Project Operations and Financial Workflows with Morpheus

The Challenge

DBSI is a leading financial transformation firm specializing in design-build, digital signage, experiential marketing, service, and equipment. With a fast-paced operational environment and complex project workflows, DBSI needed a more efficient way to manage project financials and operational processes across Autodesk and Viewpoint systems.

Prior to working with Morpheus, many key processes relied heavily on manual coordination and inconsistent workflows. Requests moved through email chains, phase codes varied across departments, and budget validations often occurred late in the process. This created unnecessary rework, slowed approvals, and made project closeout more time-consuming than it needed to be. The result was added administrative effort, inconsistent data, and limited visibility across teams.

The Solution

Morpheus partnered with DBSI to create a more connected and standardized workflow between Autodesk and Viewpoint—without disrupting existing systems or requiring teams to adopt entirely new processes.

The solution focused on improving clarity, consistency, and accountability across project financial operations by:

- Standardizing phase code structures and change order processes
- Defining clear ownership for contract creation and execution
- Implementing required budget validation checkpoints within Viewpoint
- Clarifying responsibilities between Accounting, CPCs, and project teams
- Streamlining approvals and reducing manual back-and-forth communication

Rather than introducing additional complexity, the goal was to simplify and automate the workflows DBSI already relied on every day.

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“None of this was anyone’s fault—it was just inefficient and time consuming.”

— **Vimarie Tilelli**
Operations Manager, DBSI

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“The biggest impact has been fewer mistakes and fewer corrections.”

— **Vimarie Tilelli**
Operations Manager, DBSI

The Benefits

By improving system alignment and operational consistency, DBSI experienced measurable improvements across project execution and financial management. Key features of the Morpheus-led integration include:

Key Outcomes

- **Faster contract and change order processing**
- **Reduced rework and manual corrections**
- **Improved confidence in budget accuracy**
- **Cleaner, more efficient project closeouts**
- **Less time spent reconciling data between systems**

Operational Impact

- **8–12 hours saved per project each month** by reducing manual cleanup, duplicate entry, rework, and last-minute corrections
- **Dozens of project records automatically synchronized** across Autodesk and Viewpoint, including budgets, contracts, purchase orders, and change orders
- **Improved budget accuracy and financial visibility** through earlier issue identification and standardized phase code structures
- **Faster approvals and cleaner project closeouts** by streamlining workflows and reducing administrative back-and-forth
- **Reduced operational risk and manual errors** by keeping data aligned and consistent between systems

“Instead of adding new tools, we focused on clarity and consistency. Overall, things just flow better.”

Vimarie Tilelli – Operations Manager, DBSI

By partnering with Morpheus, DBSI streamlined critical financial and operational workflows, reduced manual effort, and created a more connected foundation for scalable, efficient project delivery.

WHY MORPHEUS?



**FULLY
AUTOMATED**



**COMPLETE
CONTROL**



**ENDLESSLY
CONFIGURABLE**