Portfolio: Account Overview

Account Value: €14,000 - potential value upon success €56,000 (discount recovery based on success within 12 months and global expansion)

Engagement Duration: 12 Months
Payback Period: 4 Months

Strategic Approach

- Conducted a thorough **MEDDPICC analysis** to align expectations and streamline decision-making.
- Designed a **12-month plan** with milestones at 4, 6, 8, and 12 months to demonstrate ROI.
- Implemented a **6-week onboarding program**, including workflow setup and user training, to ensure smooth adoption.
- Scheduled **monthly performance reviews** to monitor progress and adjust strategies as needed.

Client Objectives

- **Unified Platform**: Consolidate multiple tools into one system for efficiency.
- **Process Efficiency**: Reduce time spent on repetitive and manual tasks.
- **Accurate Billing**: Enable clear time tracking and multi-currency invoicing.
- **Enhanced Collaboration**: Improve team communication and resource management.

Key Features Delivered

- **Resource & Capacity Management**: Real-time visibility of workload with alerts for over-allocation.
- **Timekeeping & Billing**: Time tracking with task/milestone association, multi-currency billing, and VAT configuration.
- **Integrated Notifications**: Alerts for task completion progress and justifications for non-billable time.
- **Leave & Expense Management**: Approval workflows for time off and expenses, visible dashboards for team-wide transparency.

- **System Integrations**: Integrated with MS Teams, MS Outlook, and potential QuickBooks.

Teams and User Allocation

- **Management & Admin**: 9 Users – All Access + Approvals, Reporting, and Billing.
- **Consultants**: 16 Users – Time & Expense Capture, Task Engagement.
- **External Clients**: ~30 Users – View-only access to relevant project details.
- **Support Team**: View-only for MSaaS Projects, Time & Expense Capture.

Challenges Addressed

1. **Fragmented Systems**: Consolidated workflows into a single platform.
2. **Inefficient Timekeeping**: Introduced tools to track time with task-level associations and rounding.
3. **Manual Interventions**: Automated notifications and approval workflows to reduce overhead.
4. **Visibility Issues**: Enhanced dashboards for deadlines, leave management, and pipeline tracking.

Project Methodology

- **Hybrid Approach**: Combined Waterfall methodology for setup with Agile for deliverables.
- **Template Standardization**: Developed repeatable templates for key projects, including CRM milestones and custom development.

Results and Impact

- **Efficiency Gains**: Unified project, time, and billing management.
- **Streamlined Workflows**: Reduced manual interventions and improved team productivity.
- **ROI Delivery**: Achieved payback within 4 months, with continued progress tracked via monthly reviews.
- **Team Adoption**: Successfully trained users within 6 weeks, ensuring high engagement.

Future Expansion Plan

- **US Team Growth**: Plan to onboard **60 additional users** as part of future expansion.
- **Multi-Year Agreement**: Potential for a long-term engagement contingent on achieving key goals.
- **Scalability**: Enhanced systems to support larger teams and broader use cases.
- **Strategic Growth**: Focused on showcasing ROI and ensuring seamless adoption for new teams.