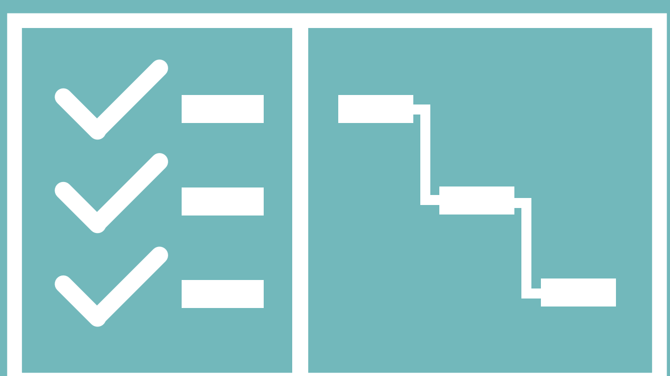
SYSTEM SELECTION AND IMPLEMENTATION GUIDE

Job Costing and

Project Management

Systems for Consultancies



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YOUR BUSINESS FOCUS

WHAT DO YOU WANT THE SYSTEM TO DO FOR YOU?

What can the best project and consultancy management systems on the market deliver?

We recently asked consultancy and agency managers about their expectations for new systems.

Six factors led the field:

INCREASE PROFITABILITY	INCREASE CONTROL	IMPROVE CLIENT SERVICE
REDUCE WASTE	INCREASE SPEED	IMPROVE VISIBILITY

Think of them as the Big Six Classic Wins that you can expect from good systems.

So, when you invest in a system, can you guarantee it will deliver all these? It's not quite as simple as that. The truth is that different systems focus on different things for different types of company. So you need to be sure what kind of a business you are. Before going any further, therefore, consider this:

> *Businesses vary in their degree of commercial-focus. How much does yours have? For some companies it's all about the financials. Others have less focus on those areas. Where on that spectrum does yours sit? And where do you want it to be? What are the biggest gaps between where you are and where you want to be?*

With these issues in mind... Welcome! The selection process can begin...

The purpose of this document is to help buyers discover how to harvest the best returns from their next system. These pages are designed to help:

- clarify the opportunities available
- ask great questions, including some they might not have thought of
- avoid several pitfalls
- choose between different types of implementations
- communicate well with team members about their forthcoming system
- choose the optimal system for their company

KEY CONSIDERATIONS

FIVE ESSENTIALS TO CONSIDER

To reach those six classic wins there are several crucial considerations to take into account:

1. Flexibility. Much software today is very rigid. Users choosing such systems have to change the way they do things simply to fit the software they have bought. And when their circumstances alter later, as they almost always do, there is no easy way for such software to accommodate them. Some software, however, is flexible, so seek it out.

2. Complete solution. Some systems are designed from the ground up to optimise the commercial aspects of running a consultancy or agency. It's a specialised area affecting the way the features are written, collect just the right data, connect into an intelligent whole and report crucial information to staff and managers. So, if your firm scores commerciality highly, make sure you include vendors on your shortlist that have a good reputation for delivering on it.

3. Scalability. It's hard to predict how your company might develop over the years. Growth might not be your number one concern today. But why buy a system that restricts your future options? With some systems you would find one day that you have outgrown its capabilities, giving you no choice but to start all over again. Whereas others can grow with you, even handling hundreds of users.

4. Can you work with the supplier? This is one important factor that's impossible to verify from studying vendor websites. How well will your team get on with the consultant, the implementer and the trainer? How experienced is their team in working with your type of firm? Or in understanding your needs and listening to your concerns?

Find out all you can about them. Ultimately, it's only by talking with the vendor, engaging in social networking and following up on user testimonials that you can get answers here.

5. Stability of product and supplier. You want your system to serve you for years to come. What is the track record of the software and the supplier? How committed are they to this marketplace? Are they trading profitably? Is their reputation solid? These are important questions to resolve – you deserve a system you can depend on.

SUPPLIER SELECTION

BEST PRACTICE

Here are six best practice steps when looking for a new system:

1. Define your key requirements and critical success factors. Consider what you need to be successful. Identify the essential requirements from the merely important or nice-to-haves.

2. Get key people on board and select a system champion. Identify your key people. You want to capture their knowledge, gain their buy-in and select a system champion – someone who knows the business, has the trust of staff, communicates well and will make the right decisions.

3. Resist the temptation to bring someone in temporarily. The system champion will end up knowing a great deal of your business processes and will be training new staff as they arrive. It's not a job for a temp.

4. Create a list of potential suppliers. You can create this by web searches, asking new starters about systems from a previous firm, and from industry associations and business contacts. Word of mouth is alive and well in our industry. This includes seeing how vendors are rated in social media and whether one, for example, tries to hijack threads to their own ends. A reputable vendor will let their customers speak.

5. Initial demonstration. Send your requirements to vendors and ask them to show how they match up. Assess if each feature is fully or partially addressed, needs a simple workaround or is planned for the future. Then decide which to see in demos.

In those, focus on your key requirements. Ask for the demonstrator's input on best working practices to see how well they grasp it. Be wary of vendors showing functions that look good but don't show a benefit. Note that you can conduct these initial demos online to save time. They could take 1½ - 2 hours.

The purpose of the demos is to select a shortlist for investigation. You are looking to meet your specific needs, including usability, so don't be sidetracked. Does it feel like something you could use day to day? Don't judge a system just on appearance. Just because it has a nice look does not mean it is easy to use.

6. Create a shortlist of serious contenders for detailed meetings, 2-3 max. Prepare sample scenarios that cause you problems today. Have vendors demo separate business areas and invite key team members to each. If a vendor declines to give a detailed onsite demo, think very carefully about their likely level of service. It could also be an indication that they feel they are not a good solution for you in the first place. And always ask for reference sites.

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FUNCTIONALITY CHECKLIST

YOUR GUIDE TO THE ESSENTIALS

Here's a master checklist of top-level functionality you should be looking for when considering a system:

TIME & MONEY	PLANNING & TRACKING	COMMUNICATION & SHARING	REPORTING & MANAGEMENT	NEW BUSINESS
Time & expense recording	Scheduling	Client portal - online client access to jobs	Key reports	Opportunity tracking
Job / project costing	Capacity planning	Email integration	Emailed alerts of potential problems	Lead generation
Billing	Project planning	Document management	Scheduled reports	Marketing campaigns
Accounts integration	Job / project tracking	CRM	Drag & drop reporting	
Estimating & quoting		Mobile app		
Purchasing				

IMPORTANCE OF TESTIMONIALS

REAL PEOPLE, SAYING REAL THINGS

Learning things the hard way is costly. Why not benefit from the experience of others?

When you're thinking of acquiring something as important as a system on which to run your entire business, it makes sense to learn what you can from those who have already made the move.

A supplier worth its salt should be able to provide you with any number of references from all types of clients. The full list itself may not be published online for reasons of confidentiality, but if you ask in good faith you should be allowed to see it.

When evaluating references, quotes and case studies, make sure they cover a diverse range of topics so that you can focus on the aspects you are most interested in, rather than merely a single strand. The chart here shows topics you might expect from such a list.

FLEXIBILITY	REPORTING	ROI
CLIENT TRANSPARENCY	CONTROL	EFFICIENCY
ESTIMATING	SCHEDULING	TIME SAVED
EASE OF USE	FORECASTING	OVER-SERVICING
PRODUCT DEPTH	CUSTOMER SUPPORT	VISIBILITY
CASH FLOW	PROFITABLITY	WORK IN PROGRESS
INVOICING	DECISION SUPPORT	RECOMMENDATION

IMPLEMENTATION OPTIONS

IT'S YOUR CHOICE

Here are two classic but very different approaches you can choose from when planning your implementation.

1. Fast track implementations. Based on best-practice methods. Ideal for consultancies that:

- want quick wins and the fastest return on investment
- are happy to accept best-practice advice as guidance
- want to avoid a process of analysing their current working methods in detail, preferring to get started and consider incremental changes later
- are not very interested in examining multiple approaches, preferring to get on with the implementation and enjoy the benefits quickly
- appreciate that best practice may well raise efficiencies in themselves
- want quick benefits to give early encouragement to users & management
- want implementation timescales to be accurately scheduled at the outset
- prefer easy solutions that increase confidence in the resulting system
- want the lowest cost

2. Consultative implementations. In this approach, the configuration of the system is very closely mapped to your existing processes and procedures, via close consultation. Ideal for firms that:

- want to take the opportunity to investigate their own methods and see which can be improved
- want to compare their ideas with best-practice approaches in order to see which is best for them
- are keen to make sure that when the system is up and running it will deliver the maximum possible return
- want a system that embraces their firm's unique methods and hard-won competitive uniqueness
- see that investigating their current methods may well uncover valuable scope for efficiencies and even increase departmental collaboration
- want go the extra mile to do it once and do it right

Note that not all vendors offer a full consultative approach, however. Further, not all systems offer built-in flexibility of functionality. For consultancies who value both these traits they should consider vendor selection particularly carefully.

MIGRATING TO A NEW SYSTEM

OUT WITH THE OLD...

Until recently, the majority of firms choosing a job / consultancy management system were previously using manual or spreadsheet methods. However in 2015 over 50% of businesses implementing Synergist were migrating from another job management system, exceeding manual systems for the first time. The industry is experiencing a swathe of second-generation switching from one vendor's system to another. This is almost always because of user frustrations due to lack of needed features, poor end-to-end integration or unacceptable service levels.

When switching from one system to another you will obviously want as smooth an implementation as possible. A note of caution: if your previous system was hosted, termination of the agreement will result in losing access to all your data.

You are advised to seek evidence of your new vendor's experience in transferring data across. A vendor should have comprehensive migration facilities.

When planning the move, consider quite why you are switching. The important thing is to avoid repeating the same problems with the new system. What were the previous selection criteria?

If you are switching from a manual or spreadsheet-based system, the implementation is more straightforward, of course. The main benefits you will experience are:

- Multi-user operation
- Graphical representation of job progress, e.g. by thermometer
- Web-based functionality for working off-site
- Instant reports and analysis
- Direct link to major accounts packages
- Real-time budget management
- Automated email alert notifications

THINGS TO AVOID

DON'T LEARN THESE THE HARD WAY

Synergist, along with Magnifeye (part of *The Agency Works* team) have been implementing job / project management systems for over fifteen years now, so we hope we might be forgiven for saying that we have learned a thing or two along the way. Here are some things to avoid that come to mind:

Involve different departments in the process, including Finance

It's important to involve multiple departments when implementing your new system. In some implementations we've seen, finance team members have not been involved in system choice and implementation. The result is rarely a great execution. But a balance does need to be struck. Don't let one department make all the decisions. For example you wouldn't want to over-complicate life by setting up a level of analysis that sounds good in theory but that no-one is going to look at in practice.

Don't do planning during training

You will need to clarify how you want jobs to flow through your business. The implementers can help you. But sometimes we've seen people postpone all that and get the training started. It's not the smart way of doing things: valuable training time is wasted while people debate how they want the system to flow for them, and users can become confused and lose confidence.

Free groups up for the half-day training sessions

Continuing with the training theme, it's smart to plan how the company will function while staff training is in progress. It's not that training takes a long time – it doesn't – but you want to get it right. You don't want to disturb the training sessions if possible.

Customer support

The importance of good support is often overlooked. Users who have sudden queries want accurate answers, fast. They may be under pressure. Sadly, our industry has a mixed reputation in support, so this is one factor for prospective purchasers to investigate very fully. Look for suppliers who offer large numbers of reference sites. They can't do this if they don't keep their clients happy.

Don't buy a system based on looks

Focus on what's critical for your business, and check to see if the system really delivers on it. You wouldn't buy a car without knowing it can perform.

IMPACT & INVOLVEMENT

1 THE FINANCE DIRECTOR

FDs seek validation that systems will deliver live centralised data on profits by client, market sector, type of work and team, tracked against target and with drill-down data. They look for tools to aid cash flow, e.g. making billing as speedy and fault-free as possible. Early invoicing is a major profit contributor, considered an 'easy win' by FDs implementation veterans. Other needs:

- Return on investment analysis.
- High-quality endorsements from FDs and MDs of similar companies.
- Seamless links to the accounting system.
- A fully-connected system showing the same live data for all.
- Transparency for large clients that demand it.
- Painless scalability for future growth.
- Robust product quality and outstanding customer service.
- The FD role is also invaluable in specifying the needs of the company at implementation.

2 FINANCE / ADMINISTRATION

These team members naturally want a system that makes their life easier, not more complicated. Changing to a new system can be worrisome. It should be clear to use and make the individual far more productive than before. People in such roles seek: Ease of use. They want to pick up a new system quickly. Good training is important, and this can be underestimated. Don't take it for granted – check the vendor's credentials on it. Dependability. They want validation that the system will be reliable and not let them down. Have excellent support. Users want to be in safe hands. Check for first class hand-holding when going live, plus high quality ongoing support by phone, email and online. Check if the vendor has good online knowledge-based information systems that users can access. Most of all, the litmus test of service for most people rests on the quality of live telephone support. Is there always someone available to talk to? How knowledgeable is the support team? How quickly are queries resolved? Only user testimonials can answer these questions.

IMPACT & INVOLVEMENT, 2

3 THE MANAGING DIRECTOR

Benefits that MDs often value are:

- Total live visibility of jobs and projects
- Real-time work-in-progress summary reports
- Profitability reports by client, job, department, team
- New business forecasts
- Staff utilisation reports
- Key reports emailed to them automatically on set days
- References from other MDs
- Validation of ROI
- A classic example of the last two bullet points is a quote from a Synergist user Managing Director – Fred Brown – that MDs will look for.

  "It comes down to ROI... We have increased our turnover by £200k for an investment of £10k. That is a no brainer."

4 THE PROJECT MANAGER

As the link between client and the company, project managers are the peace-keeper, the diplomat, the grand persuader and the person at the front line of the action. Such a job relies heavily on accurate joined-up information such as:

- Quick and easy invoice creation
- Instant access to contact details
- Attachments to briefs so all information is in one place
- Job history archives
- Work-in-progress information
- Estimates vs Actuals
- Profitability of jobs and clients

IMPACT & INVOLVEMENT, 3

5 THE TIMESHEET USER

Timesheets are no-one's favourite. But there's no denying their immense value. How could any firm manage for long without knowing which jobs and clients are profitable, with time to correct problems before it's too late? So, the need for timesheets is clear. How can they be made as fast and easy as possible to fill in?

- Many systems offer web browser-based time entry, ensuring time can be entered from any device connected to the internet.
- Good systems offer multiple time entry interfaces, including daily /weekly, plus prefilled timesheets based on resource scheduling. Users can select the interface that works best for them.
- Users don't even need to know the job number. Selecting the client name and job description should trigger the job number automatically.
- Good timesheet interfaces can also show the users how many hours have been budgeted for the task, when it's due and – with a single click – give them access to all attached files and related emails.

6 THE RESOURCE SCHEDULER

The role of a Resource Scheduler is a world of deadlines and details. They are the professional jugglers, grappling with resources, availability and capacities that constantly change. They look for

- Easy-to-use visual scheduling tools
- Everything pulled together into one live system
- Information already in one area, e.g. estimating, to speed up data entry in another, e.g. scheduling
- Capacity planning reports with loading on departments, teams, individuals
- Timesheet analysis
- Alerts when jobs start to go over budget
- Deadline management
- Client approval tracking
- Utilisation reports
- Forecasted hours reports

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IN CONCLUSION...

... A SUMMARY ON ONE PAGE

How do you go about choosing a job / project management system? We'd say that when you boil it all down there are only four questions for you to really get to grips with:

- Does the system offer real flexibility to deliver what you need now and into the future?
- Does the system pull everything together into one connected whole?
- Is the customer support so dependable that your mind is put at rest?
- Are you focusing on your essential requirements? Don't get sidetracked.

Get these fundamentals right and you can't go so very far wrong.

Finally, one more question. When is the ideal time to make a decision like this? We hope you'll forgive us for quoting Steve Revell on it. He is Managing Director of Maleon, a consultancy using Synergist. He said:

> *"We decided that there's no magic perfect time to install a management system.*
>
> *We'd recommend that firms should just do it as soon as they can. Bite the bullet!"*

We hope you found this Guide useful. We love to talk about job and project management systems – it's what we do all the time. So feel free to give us a call to chat about it.

Wishing you well with your new system...

The Synergist team

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