➔ Tracking Data on the Move

ProcessFlows' Client Services Department is using Intuitive Business Intelligence Dashboards to provide an at-a-glance, real-time view of their services and consultancy activity and support contract renewal process. Being able to see who is doing what and when, which projects are overrunning and newly logged requests, is giving management the ability to make informed decisions which positively influence productivity and, ultimately, profitability.

ProcessFlows services

ProcessFlows' Client Services Department works across every area of the business – supporting sales with the technical elements of every business proposal, through the software integration project, to ongoing post installation 24/7 helpdesk support.

Balancing staff and resources

At any time, Graham Reddie, Services Director at ProcessFlows, can be managing up to 30 Service staff based at customer sites or at home, plus a team of 15 office based help desk staff in Winchester and Sofia; all working on a diverse range of projects and tasks.

A need to access data in real time

Graham said; *"We needed access to live information and the ability to query the data, to help us make well informed decisions."*

Dashboards was able to help

Dashboards is a real-time user interface which, once integrated with back office systems, graphically presents data on the current status of the business - its systems, historical trends and key performance indicators (KPIs) - providing a much better insight into what is going on.

Similar to the instruments on a car, Dashboards gathers and displays data. It confirms when there is nothing to worry about and can identify anomalies and hidden patterns in your data, revealing that information in a simple dashboard format … giving you the time to take evasive action and limit the damage if needs be.

The Challenges managing the 3 key service areas of Consultancy, Contracts and Technical Support and how Dashboards helped ProcessFlows increase efficiency and profitability

Consultancy

If projects supporting pre-and post-sales activities and customer installations overrun, additional on-site days are required. More often than not these are not chargeable to the customer. To protect revenues, it is essential that these unpaid days are kept to a minimum.

ProcessFlows manually collated monthly reports on consultancy activity and productivity, recording the amount of revenue delivered by each analyst during that month and year-to-date, in an Excel spreadsheet, which was then distributed a week after month-end.

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The report was time consuming to produce and it proved virtually impossible to take any remedial action on lower performing months, as by the time the report was received, the information was out-of-date and it was too late to be actionable.

As well as having to wait for information, the relatively inflexible format of a spreadsheet made it difficult to spot any emerging trends from the data and it was not feasible to manipulate and query the data in a different way for any 'what-if' scenario planning.

Dashboards solves this problem by providing real-time information and reporting flexibility ... as well as providing a forensic insight into what really is going on

Intuitive Dashboards now dynamically interrogates Excel spreadsheets, giving direct access to consultancy data. Utilising Dashboards, ProcessFlows now has the additional ability to categorise and view the consultancy report data in a variety of customised and more meaningful ways.

Timesheets are used to drive the Dashboards, enabling ProcessFlows to see real-time views of time-splits at any period in the month. This ensures that months showing signs of poor performance are instantly

identified and faster decisions are taken to rectify potential shortfalls.

When analysing unpaid work, the management team now clearly sees where consultancy time is being spent, what projects are at risk of overrunning and if site visits are required to help meet installation deadlines.

> **"Intuitive Dashboards has transformed the way we 'view' our business and helped us identify areas where substantial savings could be made. It is therefore key to the future, efficient running of ProcessFlows; ensuring that we don't miss any further cost and time saving opportunities."**
>
> Chris Thompson
> Managing Director, ProcessFlows

Previously unidentified operational issues came to light

Dashboards revealed that high levels of expensive pre-sales and helpdesk resource was being taken up solving simple queries and issues.

ProcessFlows transferred this task to its offshore base in Sofia and immediately reclaimed over 30 days a month of consultancy and help desk time.

This decision has reduced operational running costs by approximately £25,000 annually. Reclaimed consultancy time can now be deployed to generate further revenues.

Contract Renewals

The Contracts Team had been unable to create informative reports efficiently or create alerts for customer contract renewal dates. As a result, in spite of best efforts, ProcessFlows' suppliers, who back-to back customer support contracts, started to penalise them for each contract not renewed before the annual expiry date. This was costing the company up to £30,000 a year.

A typical monthly spreadsheet report would take in excess of three hours to collate. And again, it was a static report that was out of date almost immediately.

Also, there was no way of creating an automatic prompt to alert the Contracts Team of any contracts approaching renewal date, something which would really help to circumvent the penalties.

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The lack of flexibility for data analysis or the ability to drill any further into the data for discovery purposes or performance comparisons against previous months/years, exacerbated the problems.

Dashboards tracks each contract

Dashboards was integrated with OnBase document management, which holds all contract, customer and supplier information, to enable quick and easy retrieval of contract details from the Dashboard interface.

The system now tracks and displays key data throughout the contract management process, providing comprehensive drill-down access to the data for analysis and explanation at every stage and providing clear notification of all renewal dates in advance.

Higher levels of renewals

There has been a 1% uplift in annual renewals as a result of using Dashboards, which equates to increased revenues of almost £30,000 a year. In addition, no longer having to fund supplier late-renewal penalties boost the savings to just under £60,000 per year.

Technical Support

ProcessFlows' busy technical helpdesk handles incident calls from customers on a wide variety subjects, about lots of different software solutions.

Working with a disparate team increased the need for senior managers to have instant, real-time visualisation of the incidents currently being handled, along with an accurate perspective of daily incidents resolved by individual members of the support team.

Services Director, Graham Reddie also wanted to embed a sense of transparency amongst staff and encourage own performance KPI management, which would in turn help to increase productivity across the department.

It is now easy to track how many incidents the helpdesk team are currently working on and what they did earlier in the day

Dashboards is integrated with ProcessFlows' CRM system, SalesLogix, so it can seamlessly extract relevant data.

Real-time current daily activity is now visible, with information broken down by product/solution. Which team member is

working on what incident is displayed, along with the status of each incident.

> **"Intuitive Dashboards has provided an invaluable, fresh insight into several areas of the business. This has allowed us to identify and achieve additional, unforeseen cost and time savings. It has also encouraged an open working environment which complements our organisational culture of light management and self-responsibility."**
>
> Graham Reddie
> Services Director, ProcessFlows

Delivering this level of transparency has improved performance

"*It's encouraging to see that a number of the helpdesk team are actively using this Dashboard on their workstations to track how they and their colleagues are performing*" said Graham.

For more information on Dashboards, please email **sales@processflows.co.uk** or contact **ProcessFlows**, Sheridan House, 40-43 Jewry Street, Winchester, Hampshire SO23 8RY Tel: 01962 835053 Fax: 01962 835100 **www.processflows.co.uk**

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