

DRIVING A CONSULTANCY

- Key issues affecting every consultancy
- Business managers' opinions about them

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DRIVING CLIENT SERVICE

A. IMPROVING TRANSPARENCY TO CLIENTS

A number of recent surveys have shown that clients are becoming more demanding. This is certainly backed up by anecdotal evidence we've been receiving from agency managers we meet. One aspect is that of an expectation of greater transparency.

Clients clearly expect more openness about job progress and health, hours worked, milestones reached and so on. As an example, we asked Steven Clark, Financial & Commercial Manager of Tayburn, what he has been experiencing.

Tayburn are a 40-strong agency in Edinburgh, Liverpool, Manchester and Istanbul. He sees transparency as a trust issue.

"We like to offer transparency to clients, so they can see the commitment and investment we're making on their behalf. It increases awareness and trust."



Steven Clark, Tayburn

It's surely part of a trend. Clients want results, but they also want openness and believable communications, which can only be delivered by having supportable hard facts. Agencies unable to supply such facts are now becoming at a disadvantage.

Rob Hill, managing director of HMA agrees:

"There's a new realism and transparency today. Clients really will not put up with mystery and pomposity."

And Lee Day, Company Director of 40-strong communications agency RJDA, said:

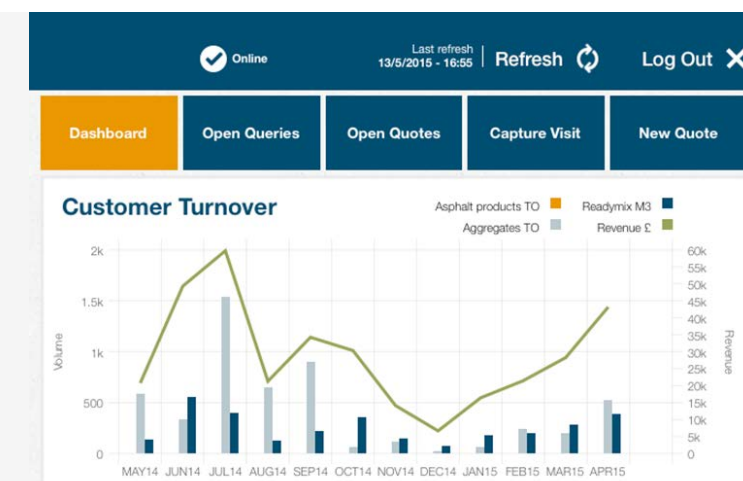
"Synergist gives us a transparency which we didn't have before. We can run digital time sheets and produce reports on those, which means total confidence for the client."



Rob Hill, HMA

For Mubaloo, the UK's leading mobile consultancy, transparency embraces entire processes. Their task was to make large enterprises comfortable with proposals for mission-critical digital projects. They realised that risk-averse enterprises crave transparent processes for trust.

Tayburn, HMA, RJDA and Mubaloo all use Synergist. You can't share serious, joined-up information to exacting clients if you don't have the data in the first place.



Client work by
Mubaloo

DRIVING CLIENT SERVICE

B. ELEVATING CLIENT CONVERSATIONS

How many different types of conversations do you have with clients in a typical month?

There are so many. Briefings. Budgets. Progress reports. Project reviews. Negotiations...

Of course it's been said that there's another way of categorising client conversations: Those that are Easy, and those that are Difficult.

Whenever one party is paying money for the services of the other, there's potentially an awkwardness. But of course there shouldn't be any inequality at all. It's two adult peers entering into an agreement of mutual benefit. However in practice it doesn't always feel equal.

So, can adult-to-adult conversations consistently take place between client and consultancy? Yes. Here's an example.

A director of Bladonmore told us that they when they installed a new consultancy management system (Synergist) they experienced a number of improvements. One was the reduction of over-servicing, a key reason for them getting their new system in the first place. But the second improvement was a little more unexpected: The new system initiated better client conversations:

"The data that Synergist delivers allows us to have conversations with clients that we couldn't have before. It's the power of proof. With data in front of you, you can discuss the situation with clarity and confidence".

With that level of information in front of you, the conversation ceases to be generic or subjective or emotional or personal. It's simply factual. It therefore raises the entire tone of the relationship, and transforms review meetings.

Adult conversations are also about honesty, according to Kent Valentine, Director of 25-strong



Client work by
Bladonmore

London project-based business Draw. And it's also about increasing the number of team members who can suddenly have such conversations with clients every day now that they use Synergist.

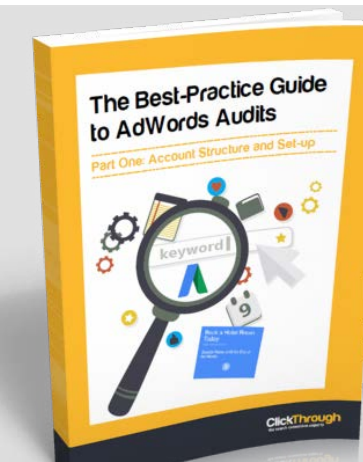
"We've got the tools now to show us what each project really costs and what its status is each day. Everybody accesses the same information. So we now encourage team members to be more up-front to clients about what the reality is at all times. It makes for honest, adult conversations going on right across the client-facing teams every day."



Kent Valentine, Draw

Lisa McLaren, Director of Finance & HR of 30-strong ClickThrough Marketing summarised the change for them when they installed Synergist:

"Smarter client conversations take place today."



Content by
ClickThrough
Marketing

DRIVING CLIENT SERVICE

C. WORKING WITH FRUGAL CLIENTS

Everybody agrees that clients are more cautious with money today than they were in the golden age, although few can agree quite when such an age was.

Client frugality means that consultancies are expected to do more with less. That's probably one of the most-heard phrases in business circles over the last few years.

In March 2015, just before the general election, WPP cautioned that economic and political "uncertainties" would continue to exert pressure on the industry, "with clients understandably continuing to demand more for less."

An article in Campaign in January 2015 said this:

"Just look at the many brands that have rationalised their agency rosters to partner with fewer suppliers and build stronger relationships with those that remain.

"This consolidation has the potential to fuel a focus on brand strategy because it benefits agencies that are able to ally brand thinking with better implementation. It signals a return to more profound relationships between brands and marketers and their key strategic agencies.

"However... more integration among agencies could see procurement looking to get more for less.

"While there are serious conversations to be had around placing true value on great thinking and creative, let's be realistic and acknowledge that clients now require clever, efficient delivery as well as our amazing ideas."

What's the best way to respond as an agency? Nigel Wilson, Managing Director of a 30-strong Birmingham project-based business, told us:

"Clients are more frugal today, more savvy. Their budgets have been tightened. Their £ has to go further. So you have to respond. It's never

been more important to be able to deliver efficiently."

His company, which uses Synergist, understands efficiency. For them, a key weapon in the frugality war is to drive efficiency and be able to demonstrate that to clients.



Nigel Wilson

Source

<http://www.ft.com/cms/s/0/4bedb9b8-c62f-11e4-9bf4-00144feab7de.html#axzz3fNefomBG>

DRIVING CLIENT SERVICE

D. MAKING PROCUREMENT WORK FOR YOU

There is no doubt about the unpopularity of procurement among consultancies, at least according to an article in Ad Age in May 2015. Quoting a recent survey, it said:

“Just 10% of agency respondents said they felt procurement added value to the client-agency relationship.”

A more positive slant on the topic was given by Tom Lewis, finance director at the Institute of Practitioners in Advertising, in a December 2014 roundtable called ‘Marketing and procurement: how to measure and maximise outcomes’.

“Marketing is an investment to be maximised rather than a cost to be minimised. We see a role for procurement in maximising investment: setting marketing objectives that are aligned with business goals and sharing those with the agency at pitch stage. Then going on to look at efficiency and effectiveness, ways of working to enhance the value that clients get out of the marketing spend.”

Some consultancies positively thrive on procurement. We met Chris Ross, Managing Director of London-based RLH who has a lot of positive experience on the subject:

“Clients demand ROI, quite rightly. And in recent years we’ve seen major corporate clients introduce comprehensive levels of procurement.”

“But there are two sides to that. We believe procurement teams must appreciate what it is we offer. We see it as part of our role to help them better understand:

- *Exactly what we do*
- *What they are buying*
- *How we operate*
- *What they should expect from us*

“Like it or not, procurement is here to stay. Fortunately, attitudes towards procurement have matured in many large organisations today.”

Procurement departments are therefore not the enemy.

“Once in the know, agencies can greatly benefit from the process and the deepened relationships that can flow from procurement.”

“Our client procurement teams are also happy. That’s because we are transparent and so we’re seen to be trustworthy.”

RLH use Synergist. For more of their story, see the infographic at:

www.synergist.co.uk/user-stories/rlh-user-story-infographic



Chris Ross, RLH

Sources

<http://adage.com/article/cmo-strategy/cmo-s-guide-agency-procurement/298536/>

<http://www.supplymanagement.com/analysis/roundtables-features/2014/marketing-and-procurement-how-to-measure-and-maximise-outcomes>

DRIVING CLIENT SERVICE

E. FOCUSING ON THE IMPORTANT THINGS

Avoiding being a busy fool is a classic topic in management textbooks. For example it's given its very own page in Leadership for Dummies in a chapter called Having Clarity of Purpose. But like a lot of management books, that all seems rather obvious. Isn't that just common sense?

Sure. However managers of two successful agencies told us how real the problem can be. It all hinges on a key question: How can you run a consultancy effectively if you don't know which areas you should be most focused on?

That's a topic that was very much on the mind of Kent Valentine, Director of project-based business Draw, when we met up recently. He reflected that a lot of companies are busy. But are they really focused on what they need to be focused on?

"There's a buzz in a busy agency. You can feel it, and certainly hear it. But the noise I'm talking about is the noise of working on the wrong things."

"In this industry you have to get to the essence of what's needed, fast. If you allow the signal-to-noise ratio to become unbalanced, people waste their talents on things that won't even help the client."

"So cut through it. Before our new system [Synergist] here we couldn't see which areas of our business we should most focus on. It's now crystal clear."

"It leaves more time for client focus. An agency bogged down in internal process-noodling can never be authentic because it's oriented inwards rather than outwards."

"Proper data helps you focus on the essentials".

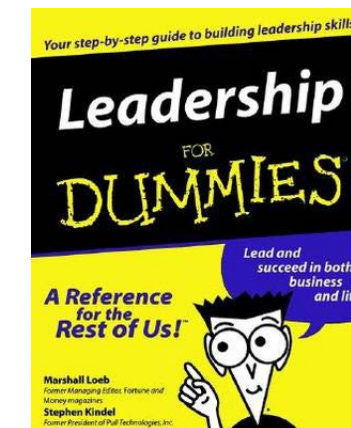


Kent Valentine, Draw

Martyn Dyer, Financial Manager of another time-based business, had a similar thought:

"Before Synergist, we used several different systems. None of their elements talked to each other. We needed far greater capture of everything that is going on. We needed to focus on key performance indicators, which relies on everything being connected, everything in one place."

They have grown from 18 people to 46 in four years. So we're certainly not talking about dummies here. Just ambitious business succeeding in securing clients and doing great work for them – and discovering along the way that knowing exactly where your resources most need to be focused makes a big difference.



Martin Dyer

DRIVING CLIENT SERVICE

F. CLIENTS ARE BECOMING LESS REVERENTIAL

Sometimes you come across an article predicting the imminent death of various service providers such as advertising agencies.

There have been articles like this ever since articles have been invented. Yet in spite of their pronouncements the world somehow continues to turn, and service providers and clients somehow continue to get along.

Late last year *Forbes.com* ran an article that was singularly miserable, quoting statistics from their Client / Agency Relationship survey. It suggested that clients are unhappy with many service providers because they don't have enough quality personnel, don't manage consistent messages across channels, don't come up with enough consumer insights and don't have enough knowledge of the clients' business. That sort of thing.

But sometimes such warnings come from the sector itself. Jeff Stark, ex of Saatchi and Saatchi, is a controversial commentator and isn't afraid to grab a headline by saying things as he sees them:

"You can't be a temperamental genius anymore. Clients are less in awe and less reverential about what we do."

"There has been a demystification of what we do which has consequently devalued our contribution. There isn't the respect and reverence for what we do anymore, plus above-the-line advertising is no longer the nuclear weapon it once was."

"Plurality is changing everything, the creative person in the advertising agency, the hot shot writer, is no longer the kingpin that he once was."

What to do? Actually the above quotes by Stark were spotted by Rob Hill, the Managing Director of Yorkshire project-based business HMA, who thinks that Stark has a point:

"That makes so much sense to us. There's a new realism and transparency today. Clients really will not put up with mystery and pomposity."

Yet HMA have some clients who have been with them from their beginning. What's the secret?

Hill believes much of the answer comes from the need to obsess about delivering results for clients.

"At HMA we have always had a total focus on producing results for clients. We work hard to clarify the exact purpose of each job, and seek out the benchmarks, the impact and the effectiveness on the client's business. It's a key part of our culture."

He says another clue is to do with keeping your business lean.

"Lean' doesn't mean 'thin.' It means order, and making everything work optimally. No waste. No inefficiencies. If you have inefficiencies, it's the client that finishes up paying for them. You need process to make it work."

Synergist plays a significant role in helping businesses drive through efficiencies. Says Rob:

"For example, it has helped us to automate reporting. Before Synergist we used to spend hours and hours on producing reports."

So there you have it, doomsayers. If you deliver results for the client and work efficiently, the world just might not suddenly end after all..



Client work by HMA

Source

<http://www.forbes.com/sites/avidan/2014/09/29/what-cmos-are-saying-about-the-future-of-their-relationships-with-agencies/>

DRIVING CLIENT SERVICE

G. PERSONALISING CLIENT SERVICES

Occasionally a business comes across a potential B2B client that has what looks like an exciting future, but it is in its early stages of development and therefore can't afford quality services from a consultancy.

Normally, of course, you steer well clear and look for a better-funded client. But just sometimes they might be tempted to think again.

One example we know – 40-strong Edinburgh project-based business Tayburn – occasionally considers giving professional services in exchange for equity. We spoke with Steven Clark, their Financial and Commercial Manager:

“When we choose to, we sometimes invest in a start-up company's branding and marketing. We take little or no fee, but we earn a slice of the equity in return. It's a strategic investment.”

It's obviously not a decision taken lightly, and not every business is in a position to even consider it. So what are the factors that might sway the deal?

Classically, there are three things to think about.

- 1. You need to be excited about the opportunity.** You would need to be very convinced about their business potential, their management team and the real difference that you could deliver for them.
- 2. You should probably partner with them.** You would want to get closely involved with the company and help steer them to success over time, rather than simply deliver a project and hope it works out OK.
- 3. You need to have the capacity.** None of the above makes sense if you're stretched to bursting. But more than that, you need to be sure:
 - a. your other projects are profitable and under control
 - b. your people's time is optimised
 - c. you're running a lean and efficient ship
 - d. you will be able to carefully track the time you're investing in the speculative client.

Only then can you be sure you really do have the capacity to invest.

Tayburn consider themselves to have a smart fiscal management. Steven said:

“We're a very creative agency here, but we're financially astute too. You have to have both of those traits, in parallel.”

It's a statement that's hard to argue with. They have been profitable every year for 35 years.

As for their management system, they use Synergist. They think it is one of the reasons that they can consider offering personalised client services like services-for-equity.

“Synergist makes that feasible, because we know exactly when it makes sense to do it from a staff utilisation viewpoint, and everything is tracked so we're in control.”



Steven Clark, Tayburn

DRIVING CLIENT SERVICE

H. MAINTAINING CREATIVITY DURING GROWTH

It's tempting for people to think that a small business, perhaps still in its start-up phase, is at its most creative at that time. Once the company grows there is a worry that it might lose some of its creative vision and passion, along with some of its culture.

But perhaps that is old, tired thinking nowadays. At least, that is according to business managers attending a roundtable meeting in September 2014 on the subject 'Creativity, Commerce and Culture – Finding the Right Balance,' organised by The Drum.

Kent Valentine, director of a project-based business, was on the panel. To him, people with creative roles are today far more commercially aware than before. So his point is that their creativity is probably protected because it's not separate in the first place. Says The Drum:

"Creativity and commerce are seen at opposite ends of the spectrum, but commerce is just another factor in the decisions you make creatively."

He adds that, in a creative industry, 'creativity' should not be the sole domain of the creative department, particularly in the digital world.

These are viewpoints that resonated with the panel, and they agree that employees must be commercially aware, if not necessarily familiar with every single aspect, and creative thinkers foremost.'

It should be noted that Draw use Synergist as their management system, which gives individuals a wider perspective on how their work links with other roles and with the financials.



Kent Valentine, Draw

To double-check, we asked two other time-based business how they fared on this topic after implementing Synergist. Nigel Wilson, Managing Director, commented on how things developed there:

"Our creativity is as high as ever, and we're pleased to say that the culture is really working. That's very important to us here".

And Simon Butler, co-founder of a time-based London business, told us:

"With Synergist we're just as creative as ever. We're still shortlisted for as many awards as we always were. We have what we call Controlled Creativity. It's creativity within a framework. Our team has the freedom to be creative, but to support that we have the metrics, the key performance indicators, for each project to work to budget, to specification and to brief."

"So you obviously need creativity but you also need good process today. And that's why Synergist wins out. Synergist totally understands your processes."



Simon Butler

Source

<http://www.thedrum.com/news/2014/09/30/creativity-commerce-and-culture-roundtable-finding-right-balance-digital-agencies>

DRIVING CONSULTANCY PROFITABILITY

A. MANAGING CLIENTS WHO WANT FREE CHANGES

It's a common refrain. A project is progressing smoothly, and then a small change is implemented at the client's request without charge. And then another. And then a larger one...

What are the reasons for these changes? Our clients have reported many to us over the years.

- As a favour in order to keep an important client happy.
- As a sweetener because the project has certain problems.
- To deliver an obvious improvement which neither party had thought of originally.
- As a favour to a client representative who probably should have specified it upfront, to cover up for them.
- As a sweetener to help a client sell the project internally because it is not getting universal support in their company.
- As something that is 'too small to bother wasting time even documenting'.
- As a pragmatic one-of-those-things event that 'always happens in complex projects'.

Of course a project professional would counter each one of these arguments in turn. These tend to boil down to the observation that keeping clients happy is very good, but changes need to be carefully documented, estimated, formally agreed and communicated, not least so that the client understands and values any concession being made.

Example: Steven Clark, Financial & Commercial Manager of 40-strong Tayburn, told us this:

"Clients are cute, as every agency knows. They subtly ask for amendments here and there, which used to get nodded through for free. But the extra work really mounts up. Our (previous) system didn't make it easy to track those changes, causing big problems."

In the web and software development worlds it's known as 'Feature creep' or 'Scope creep.' Even when you have a systematic Change Policy with a well-understood Change Request Policy it's still all too easy for people to try to circumvent it.

The problem is so pervasive that the internet is peppered with articles such as Tech Republic's venerable *Seven Steps for Avoiding Scope Creep*, the seventh of which says:

Expect that there will be scope creep. Implement Change Order forms early and educate the project drivers on your processes. A Change Order form will allow you to perform a cost-benefit analysis before scheduling (yes, I said scheduling) changes requested by the project drivers.

HBR (Harvard Business Review) calls scope creep... *a hydra-headed monster that every PM battles.* They say this:

Customers who ask for free work don't set out to reduce your profitability. They just want to get the best possible result. So it's up to you as the PM to decide whether to require a change order or complete the extra work for free. You're often trapped at the junction of "Give away money" and "Make the customer mad." It's an uncomfortable place to be.

An open-book approach to project management doesn't eliminate the challenges of scope creep, but it can mitigate them. Through team huddles where you regularly review the financials, not just progress against goals and milestones, additional commitments of labour or materials will show up immediately... for everyone to see and discuss. People are less likely to fulfill customer wish lists for free. A system like this takes some of the pressure off the PM — the whole group "owns" the problem of scope creep.

*If your project tracking system allows uncompensated work to happen under the radar, **change systems.***

Links

<http://www.techrepublic.com/article/seven-steps-for-avoiding-scope-creep/>

<https://hbr.org/2013/06/battling-scope-creep-in-your-p>



Steven Clark, Tayburn

DRIVING CONSULTANCY PROFITABILITY

B. HAVING THE TOOLS TO IMPROVE PROFITABILITY

How do you make a consultancy more profitable? There's so much we can talk about on this subject. For a start, you might want to glance at our infographic on seven ways to increase consultancy profits: www.synergist.co.uk/guides/7-ways-to-increase-consultancy-profits

Number 3 on that list happens to be *Saving Staff Time*. It's a key reason why agencies get a system. Michelle Earl, Managing Director of Earl & Thompson, said after installing Synergist:

"Many of the tasks which had taken weeks in the previous system could be reduced to hours, and...would certainly improve productivity and profitability. The system allows us to see exactly where we are with every job in terms of profitability and progress."



Michelle Earl

For the record, the other six on the list are:

- Staff Utilisation
- Job Health Monitoring
- Better-Informed Decision Making
- Resource Scheduling
- Accurate Estimating
- New Business Pipeline Management.

Each of those is a huge subject in itself, and all are tool sets that Synergist provides. For

now, let's focus on the old thorny issue of even knowing which jobs are profitable and which aren't. Kent Valentine of Draw told us:

"Proper data... pulls everyone together, shows which projects are going to be profitable and which aren't".



Kent Valentine

John Wilford, MD of Rave, used much the same language: *"Thanks to Synergist, the agency now knows which jobs are profitable and which aren't".*



John Wilford

And Lisa McLaren, Director of Finance & HR of Clickthrough, made a point about profitability being linked to integration:

"Before we went with Synergist, our time wasn't integrated with revenues. We couldn't track capacity or client profitability. We used lots of spreadsheets. Information was never up to date."

DRIVING CONSULTANCY PROFITABILITY

C. KNOWING WHEN TO LET A CLIENT GO

“Agencies fret. Like an insecure lover, they live in constant fear of being dumped.”

So said PR Week in a 2013 article about client relationships. They were looking at PRCA research (*In-House Benchmarking report*) which revealed that 51 per cent of agency respondents thought personal chemistry is what matters most in client/agency relationships. However only 19 per cent of clients thought so.

What are we to make of this disparity? And is there a lesson to be learned across the wider spectrum of creative agencies and consultancies?

It’s probably a reflection that today *results* are far more important than *relationships*. If the results aren’t there, changes will be made. It’s nothing personal.

But firing people goes both ways. Consultancies and agencies fire clients sometimes. Lisa McLaren, Director of Finance of ClickThrough, installed Synergist and told us that they then made a discovery:

“Synergist showed us that we had been grossly over-servicing one big client for a long time.

“Before Synergist we had never been confident enough to risk letting a client go. But now the data is clear. We know the time spent, job history, our capacity, everything.

“Previously, we acted like the client had us over a barrel. We don’t do that anymore.

“For any agency, decisions like this are really hard if you don’t have all the facts. They are so much easier when you do.”



Content generated
by ClickThrough
Marketing

Simon Butler, co-founder of Purestone (recently become part of the Lewis Pulse group) also thinks that turning work away is made practical through information. He gave us his perspective on this:

“We felt sure that we’d been over-servicing a particular client, but with our [previous] system we couldn’t prove it. It was obvious we needed to know profitability by client, by project and by project type, plus connect with our financials.”

They then installed Synergist:

“It tells us that we need to turn some jobs down. And we have done that. It’s based on knowledge. You know you’re right in those circumstances.”



Simon Butler

As for personal chemistry, when it exists it surely helps. But with or without it, clients are clearly more interested in results of effectiveness (which needs data) and job tracking (which also needs data). We might be in the era of The Death Of Client Relationships but The Rise of Client-Led Proof and Validation...

DRIVING CONSULTANCY PROFITABILITY

D. IMPROVING ESTIMATES

Do many people enjoy creating estimates? It's maybe not the world's most thrilling task, but the risk of getting it wrong is considerable. Underprice, and you lose money even if the project is delivered perfectly. Overprice, and you can scare a client away, perhaps for good.

But it's *underpricing* that is surely the most common problem. There are many reasons:

1. There's often a tight deadline because your prospect/client could go elsewhere..
2. If business is slow at the moment, it's tempting to pitch slightly slow to help win it.
3. It's hard to quickly pull together elements of previous jobs for comparison because there may not be a perfect match, and what information you do have is scattered.
4. You hope for flexibility in the job because some aspects are open to interpretation. If the job is won, you hope be able to steer the job to meet the budget.

But let's see what difference a serious system could make.

With Synergist the estimate is a financial model of the job, fully connected to the rest of the agency management system. So:

- It pulls together all previous estimates and quotes together into one place, making it easy to compare jobs and learn from previous experience.
- It prompts the user to consider the details of what's required to do the job, whether basing it on a template, an existing job or from scratch.
- It displays the estimated cost and recommended charge for doing the job, based on either standard or client specific rates, and hence the margin you work on.
- The estimate can then be automatically reformatted to build a quotation.
- It can be quickly edited and sent to the client as a PDF in your brand via email (created automatically in your standard email package).
- When you win the job, the estimate / quotation becomes the budget for it, allowing the various components to be allocated to people or teams.
- It gives you a live view of how the budget is being used, allowing you to identify problems early enough to rectify them as the job progresses.

- It allows you to record agreed changes to the job ensuring clear records and accurate billing.

Using such a system helps address all four of those common underpricing issues. (1). It's fast to do. (2). You can accurately build in whatever margin you want. (3). Even if you don't have a perfectly-matched previous job, you have all the information of all jobs at your fingertips, so finding useful parallels is speedy. (4). You are far less likely to get in a position of quoting for work that lacks clarity. Synergist makes it easy to communicate transparency over the elements and phases of the job and the later progress on it. Clients greatly value this.

Another bonus is that the system becomes ever more valuable over time, as more and more job intelligence is built up. Phil Robinson, Founder and CEO of a project-based business installed Synergist and told us:

"Time is completely visible now. It's helped us improve future estimating and quotes and a lot more. What it gives us is phenomenal. It's given us efficiencies from beginning to end"

And Kent Valentine, Director of another time-based firm, said after implementing Synergist:

"We used to spend masses of time searching for information or pulling together reports or estimating work or doing invoices. Such a waste. Now, that's all cleaned up. It leaves more time for client focus."

A final thought. Such a system makes it far easier for team members to create estimates themselves instead of relying on one person. David Ladds, Director of Bladonmore said:

"We don't need an estimating department, we need everyone to be given the tools and the data to estimate their projects accurately."

And Steven Hunt, the founder of the Liverpool consultancy in his name, said:

"Another benefit is that today, everyone can estimate fees. It doesn't just fall onto my desk."



Client project by
Steven A Hunt &
Associates

DRIVING CONSULTANCY PROFITABILITY

E. REDUCING OVER-SERVICING

In June 2015 **The Drum** published an article about over-servicing, quoting Jay Neale, MD of The Agency Works / Magnifeye.

They had recently [carried out research](#) showing that 66% of agencies and consultancies in the UK are over-servicing. Neale says:

"It highlights a dangerous cycle of recruiting people to eventually over-service clients.

"This over-servicing has become the bedrock of financial challenges for agencies today. Frequently clients are demanding work that costs time, effort and resource, yet agencies are not getting the financial recognition for their work. 66% of the agencies that took part in the research saw their biggest financial challenge as over servicing; 48% saw their biggest challenge as increasing profitability.

"Over servicing and reduced profitability go hand in hand, resulting in this vicious cycle of driving new business to increase the profitability, which in turn is over-serviced and subsequently, becomes unprofitable.

"The real challenge is to manage the over-servicing and to increase the profitability before driving more new business."

Here are the views of five managers on the subject of over-servicing. All now use Synergist. First up, Phil Robinson, Founder and CEO of a project-based business:

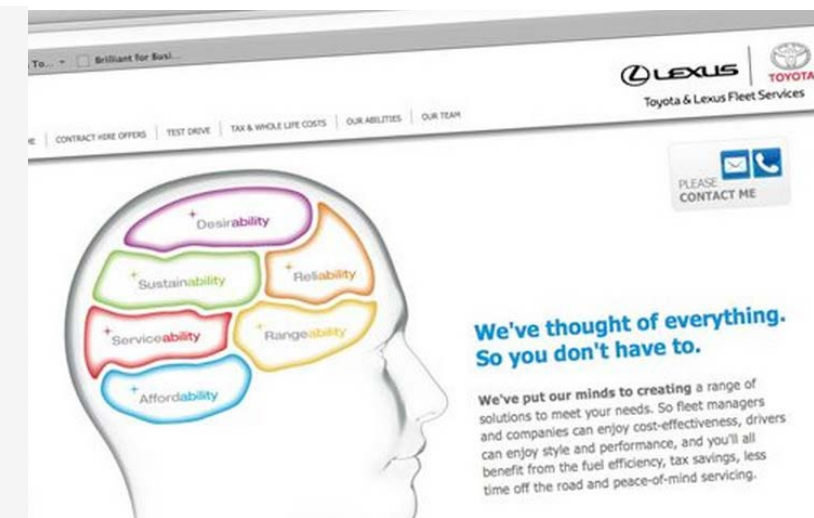
"Synergist showed us we had been heavily over-servicing. We also see patterns in the over-servicing now. For example, by client type. Very useful."

David Ladds, Director of Bladonmore, said:

"Over-servicing isn't automatically wrong, but you need to know exactly where it's going on."

Chief Executive Julie Clare of Clear Communications told us:

"Clear has been able to reduce over-servicing considerably."



Client work
by Clear
Communications

Liam Herbert, then Managing Director of JBP London, said:

"The system has highlighted and helped prevent over-servicing on certain accounts."

And Steven Hunt, founder of consultancy Steven A Hunt & Associates, told us:

"Sometimes a client asks a favour and wants some extra work without paying more. Our engineers like to help where they can. It's natural. But we just need to know where it's happening, so we can monitor it. And that is what happens now.

So our engineers can now sit down with the client and show what's happening, and they can articulate exactly when an extra fee is needed. And clients respond to that. It's in the open. Whereas before, we would just leak away those extra hours and lose them."



Client work by
Steven A Hunt &
Associates

DRIVING CONSULTANCY PROFITABILITY

F. SELLING RETAINERS MORE EFFECTIVELY

There are at least two aspects of retainers that are much in debate just now.

The first one is to do with content. We recently read a hugely depressing blog by the Senior Vice President and Head Of Office at OgilvyOne Worldwide. She said:

“The entire system of retainers and commissions is broken. Driven down by purchase/ procurement teams whose KRA [key responsibility area] depends on the cost saving they get by negotiating with partners, agencies today work on thin margins, undercutting other agencies in the fray to get the business.”

Oh dear. Doom.

The piece didn't talk about how shifts in business and society are creating opportunities for consultancies and agencies, however, and some of these play well for retainers. Retainers have never been as easy to sell as service providers would like. But we talk with consultancies every day, and many are finding new ways to make them work.

One example is the growth of content creation. Clients are quickly grasping the need to produce regular material that informs and engages and helps their audience. The concept of inbound marketing is a culture change for most clients, but it has rapidly become an area of focus. It plays perfectly to retainers. After all, a brand can't create a public position of thought leader, problem solver, educator, information provider and listener if it's merely doing opportunistic one-off projects. It's all about creating trust over time.

But it doesn't make selling retainers automatic. B2B Marketing website in March 2015 said:

“Only a third of B2B marketing agency clients are on retainers (16%) or under contract (20%) – the remaining proportion are ad hoc. This means that 64% of work is unplanned and not under contract, which is leaving businesses constantly scrambling to secure work.”

It will be interesting to watch those numbers in the future as even the most traditional clients start to grasp the power of content.

The other helpful trend currently affecting retainers is the rise of both:

- project visibility, and
- client transparency.

The logic is this. Selling a commitment for continuous work for a year's period is scary enough from the client's perspective. Having only a sketchy outline of what all the work will be, because some of it will depend on circumstances as they arise, makes it worse.

But the final straw is the fact that after each month's work, it's hard for the client to grasp what has gone into the creation of it. They might think that it was rattled off at speed, with much of the retainer ending up being a nice little earner for doing nothing. It's an age-old suspicion that clients are almost bound to have.

But the rise of visibility and transparency changes all that overnight. Phil Robinson, Founder and CEO of Clickthrough, installed Synergist and told us:

“Time is completely visible now. It's helped us sell retainers... and a lot more. What it gives us is phenomenal.”

The technology allows you to share information with clients in a way that more detailed and more believable than before. So, once again, it's all a matter of trust. This time, not between brand and customer but between agency and client. Either way, using your consultancy management system to help increase trust is clearly a trend that's not going to go away.



Content created by ClickThrough

Sources

<https://www.linkedin.com/pulse/20141209180830-1981986-the-broken-ad-agency-model-and-the-overhaul>

<http://www.b2bmarketing.net/blog/posts/2015/03/26/four-key-challenges-facing-b2b-marketing-agencies-2015>

DRIVING CONSULTANCY PROFITABILITY

G. SAVING TIME

What's the real impact of saving time? Is it the money saved? The productive time released? Or faster access to information?

We discussed it with no less than six business managers who use Synergist...

Kent Valentine, Director of Draw, told us that it's all about releasing more time for clients:

"We used to spend masses of time searching for information or pulling together reports or estimating work or doing invoices. Such a waste. Now, that's all cleaned up. It leaves more time for client focus."

Steve Lawrence, Operations Director of LHM, emphasised the speed involved:

"We can immediately see the state of net sales. It only takes a second. We can now get live results like that at any time of day."

Deep Sangar, Production Manager of another time-based business, also picked up on the speed angle:

"It tells me immediately about the state of every job, the requisitions, the time remaining, the time quoted, everything."

Paula Murray, Financial Controller of Leith, told us that their previously laborious month-end procedures took 10 days of long hours, and are now completed in 5 days even though the volume of work passing through the agency has almost doubled.

"The time it has freed up is now used to monitor the reports available from Synergist. This means we can now act on the information we have, rather than just collecting it, which has allowed us to improve significantly the efficiency of the whole agency."

Several focused on the avoidance of pain. Andy Wainwright, Fifth Ring's Operations Manager, told us:

"The biggest impact has been the huge reduction in tiresome and repetitive administration tasks, which has resulted in a considerable time and cost saving for the agency."

He went on:

Given the time saved on administrative tasks alone, I would not be surprised if the investment has paid for itself already, and we have yet to use all its capability.

It's one thing to reduce pain. But can an agency management system deliver pleasure? Matt Fairweather, founder of the company in his name, thinks so:

"Having made the decision to install Synergist we have not looked back. It is far quicker and more user friendly than the previous package, and reporting at the end of a month is a pleasure rather than an extended, time-consuming chore".

But can the time saving be quantified? Let's return to Steve Lawrence of LHM. When we asked him if he could put some numbers on time saved when using Synergist compared with their previous system, he did some analysis and sent us this summary:

HOURS SAVED PER MONTH

MANAGEMENT



STUDIO



OVERALL TIME SAVED



COSTED AT £90

IT'S THE EQUIVALENT OF **£3,690** PER MONTH

DRIVING CONSULTANCY PROFITABILITY

H. REDUCING COST OVERRUNS

Why do clients terminate relationships with their consultancy/agency? A 2015 report by SoDA showed that *Cost Overruns* almost came top at the top of the list, beaten only marginally by *Needs Outgrew the Agency's Abilities*.

Cost Overruns was also the second reason agencies gave for their termination.



So cost overruns could hardly be more dangerous: at stake is the real risk of losing clients. The solution can only involve implementing a serious project management system.

When we met Alexandros Iakovidis, Managing Director of London-based consultancy Europe Economics, he told us that they had been juggling spreadsheets for a long time. This had caused 'all sorts of difficulties' for the successful consultancy.

When he viewed Synergist he saw that it would replace the vast majority of the spreadsheets and help the team find information far more quickly than before. But what was particularly crucial for him was its ability to identify projects that were overrunning. He therefore

implemented Synergist. This was over two years ago.

After implementation, what were his main observations? He said:

"Synergist has definitely done what it should:

- 1. We have seen a reduction in project overruns.*
- 2. It allowed us to have a more timely view of costs and profits."*



The company advises a wide range of clients including companies large and small, trade and professional associations, regulators, competition authorities, governments and supra-national organisations like the European Commission.

By the way, we see that the number 5 reason on the list of why clients terminate relationships is 'Unhappy with Project Management.' Could the need be any clearer? So it's not an isolated issue but a part of the overall system delivery. Steven Clark, Financial and Commercial Manager of Tayburn, mentioned cost overrun tracking as part of the overall landscape that Synergist tracks for them now:

"Synergist pulls everything together. We track income, work in progress, cost overruns, margins, time utilisation, profitability analysis – everything comes from Synergist".

Steven famously said *"If Synergist was somehow taken away from us, it would be worse than us having a fire. We have disaster recovery for fire. But not having our system would bring delays in everything we do, and we'd lose the visibility everybody wants.*



Alexandros Iakovidis

DRIVING CULTURE & ABILITIES

A. HELPING TEAMS TO BE MORE EFFECTIVE

“How do you define the phrase ‘team effectiveness’? In what way would you expect a new consultancy management system to contribute to that?

The following 8-point checklist emerged as a result of answers given to us by six managers who have gone through the experience of implementing a Synergist system.



Steve Lawrence, LHM’s Operations Director, said:

“It [Synergist] empowers people. Everything is more transparent. It helps everyone to see how they can be more effective and more profitable from then on, and give better client service at the same time.”

Steven Clark, Financial and Commercial Manager of Tayburn, told us:

“The team are much more empowered now. It’s been an education for the team”.

“We give transparency to our teams, so they have the information they need to manage jobs properly.”

“And the team sees how many hours are allocated to a job and how many hours are left. So when we have a Monday morning meeting to allocate who will be working on which job, it’s completely transparent to all.”

Kent Valentine, Director of a London project-based business, said:

“Synergist is the phenomenon that touches every person in the agency, so it can join everything up, pull people together and demonstrate the value of each team to the rest. It increases people’s awareness of how everything works.”

And Nigel Wilson, Managing Director another time-based firm, told us:

“It’s educating the team. They make better decisions now. It promotes self-education. Team members are much more aware now of what costs go into a job”

Michelle Earl, Managing Director of Earl & Thompson, said:

“It has handed back responsibility to those people who do the work and empowered each individual to maintain full control over their own accounts.”

And Steven Hunt of Liverpool consultancy Steven A Hunt & Associates told us:

“It helps the team see how it all works and fits together. Another benefit is that today, everyone can estimate fees. It doesn’t just fall onto my desk.”



Steven Hunt

DRIVING CULTURE & ABILITIES

B. TRANSFORMING DECISION-MAKING

George Lucas once said this about decisions:

"A director makes 100 decisions an hour. Students ask me how you know how to make the right decision, and I say to them, 'If you don't know how to make the right decision, you're not a director.'"

Hmmm. 100 decisions an hour. Luckily, managing an business is a lot easier than that. You only have to make 50 an hour.

But can hard decisions be made easier? Yes, say a slew of managers we talked to. It turns out that getting a proper consultancy management system makes a real difference to decision-making. The following contributors all implemented Synergist in their UK businesses.

Kent Valentine, Director of a London project-based business:

"You need something to help reconcile your head and your heart. Before Synergist we had a big heart but we would work like headless chickens. Now, the data helps us make better decisions. It also helps us focus on our point of difference."

Ian May, Programme Director another time-based firm, told us:

"Synergist makes it easier to make those tough decisions about jobs, because the information is there to back up your hunch."

And his colleague Gareth Moore, Chief Operating Officer there, added:

"Today, we don't have to make as many hunches. Before, we might have had an inkling that a certain type of a job, for example a WordPress implementation, was not as profitable as other jobs. But now we have the data to back up our instincts."

Steve Lawrence, Operations Director of LHM, said:

"With Synergist we understand the metrics of every part of the company and track the processes and the finances. With it, we can spot issues early. We use the key reports a great deal. It's essential in decision-making."

Nigel Wilson, Managing Director of 30-strong project-based business, told us:

"You've got to think fast today. An account manager asks you about some costings. With the history of previous jobs in front of you, you can say 'Here's what happened before.' It makes decision-making easier and more transparent."

"Decisions that used to drop relentlessly into my lap every day are now taking place with no fuss. That's a payoff that keeps on paying."

Alexandros Iakovidis, Managing Director of London consultancy Europe Economics, said:

"It helps us in our decision-making as reporting is easily available. This helps us make on-the-spot decisions on many varied issues as well as more strategic ones regarding focusing more on the most profitable areas of work."

Finally, Steven Hunt, the founder of Liverpool consultancy Steven A Hunt & Associates, said:

"Another bonus that comes to mind is that I can see at a glance who the good and bad payers are. So that's now part of our decision-making about being more selective on which projects to take on."

Big decisions all.

Talking of decisions, it turns out that George Lucas never made a destiny-style decision to become a movie director. He explained: "I was going to go to a four-year college and be an anthropologist or to an art school and be an illustrator." But a friend persuaded him to go to college to study photography, and it turned out that it taught movie-making. "It had never occurred to me that I'd ever have any interest in filmmaking." Some big decisions, then, just seem to happen...



Ian May



Gareth Moore

DRIVING CULTURE & ABILITIES

C. LIFTING COMMERCIAL AWARENESS

What is the top skill shortage among graduates? The *Association of Graduate Recruiters* says that commercial awareness is the number one skill shortage in the UK. The top 10 is:

1	Commercial Awareness	67%
2	Communication Skills	64%
3	Leadership	33%
4	Ability to work in a team	33%
5	Problem solving	32%
6	Conceptual ability	21%
7	Subject Knowledge & competence	19%
8	Foreign languages	19%
9	Numeracy	19%
10	Good general education	15%

Getting a serious consultancy management system helps considerably. When we met up with Phil Robinson, Founder and CEO of ClickThrough, he told us that Synergist made an immediate impact and even acted as a career accelerator for new team members:

“When young graduates join us and work on small clients, the data now lets them be strategic. They understand the money side of things right away. It’s such good career experience for when they are promoted to handling larger clients.”

Steven Clark, Financial and Commercial Manager of 40-strong Tayburn, told us he was particularly interested in how it educated non-finance staff:

“It’s been an education for the team. It gives so much more knowledge to the account directors, for example. It’s increased the financial knowledge to non-finance staff tenfold.”

“It’s given them more of a sense of responsibility, more discipline. The team have become much more commercially minded now. They understand margins. It’s also helped our account managers & account directors earn more from existing clients.”



Steven Clark, Tayburn

Ashley Bliss, Financial Managing Partner of another project-based business, said of Synergist:

“We took the decision to invest in a management system that would provide instant reporting, full scheduling and a level of cross-agency financial awareness which had previously been virtually impossible to achieve.”



Ashley Bliss

And Liam Herbert, then Managing Director of JBP, told us:

“It [Synergist] has placed account administration control in the hands of those people that directly manage the business. This has had the highly beneficial effect of raising commercial awareness among the client management team.”

DRIVING CULTURE & ABILITIES

D. HELPING CONSULTANCY AND CLIENT ALIKE

If a **productive relationship between** client and consultancy can only happen when both parties achieve their goals, it may be useful to glance at why clients use consultancies in the first place. A 2011 academic paper called *Clients' expectations of their advertising agencies: creativity and relationship management* might give a clue. It gave four reasons why clients use agencies and consultancies rather than in-house staff:

1. For their specialist knowledge and creative ideas. Said one client: 'The core competency of the agency is their creative horsepower, which we could not replicate in house'.
2. The external team are not linked to the brand. Internal staff can be seen as too close, whereas agencies are at arms length and have rigid processes that guide projects, discourage short cuts and facilitate rational, not emotional, decisions.
3. External teams bring experience from working with other clients and products, through previous exposure to the same industry and other industries.
4. For pragmatic reasons, for example to reduce staff headcount or to focus more on core business activities.

In the spirit of coming up with working practices that help both parties, can the consultancy's choice of management system help? Synergist users tell us so.

For example Phil Robinson, Founder and CEO of ClickThrough, told us after implementing Synergist:

"So much flows from the proper tracking of time, benefiting the agency, employee and client alike."

And Lisa McLaren, their Director of Finance, added:

"I can honestly say that I wouldn't like to lose this visibility now."

Company Director Lee Day at RJDA told us that the typical dialogue between service provider and client needs a robust tool to give the information that clients need, particularly when the consultant's business is growing:

"Both turnover and staff numbers have doubled at RJDA since we put Synergist in. Synergist has played a pretty strong part in that. It has given us a slick client-facing edge."

Steve Laird, Finance Director of consultancy On Line Design & Engineering Ltd, told us:



Steve Laird,
Online Design &
Engineering

"Our clients like it and we have some huge clients, like ConocoPhillips, Total and TATA. They like the way we can give them details of time and costs on projects."



Client work by
OnLine Design &
Engineering

DRIVING CULTURE & ABILITIES

E. IMPROVING THE SENSE OF PURPOSE & BUZZ

Can you create a buzz in the workplace simply by having a continuously busy atmosphere? It surely helps, but is it enough? And what about creating a sense of *purpose*? That's certainly a bigger issue. To complicate the picture further, what if your team includes creatives? Exactly how does creativity equate with purpose?

These are big questions. But Kent Valentine, Director of a London project-based business, told us that implementing an management system can make a contribution. They chose Synergist.

"It's a tool that can help rally people to a purpose and help them understand things that seemed impenetrable or irrelevant to them before."

The argument is that giving your team members the information they need to see the bigger picture will give them a greater sense of overall purpose to their work. This applies to people in most roles. Does it also apply to creatives? And do creatives differ in their motivation?

A 2009 academic paper called *Motivating Creative Employees in Creative Businesses* by Tim Fremmich Andresen might shed some light on the issue. He said:

"Creatives are challenge-seeking in nature. [This] necessitates a focus on challenging tasks. From a management perspective, creative employees in creative businesses can be motivated by several methods. For example, focusing on:

- *challenge*
- *development*
- *freedom*
- *recognition."*

Phil Robinson, Founder and CEO of ClickThrough, told us about their business after implementing Synergist:

"It's an amazing place to be. Having Synergist is a game-changer. You can sit down and see the whole picture, make a change in one department, and then the account managers see it and act on it."

He also spoke about how Synergist acts as a team career accelerator because they understand the money implications right away. Lisa McLaren, their Director of Finance there, added:

"It's helped us change our culture. It creates a new sense of calm that we can track it all."

Steven Hunt of consultancy Steven A Hunt & Associates said of his team after they implemented Synergist:

"Now, they can take pride that when they do well on a project it is successful in every way."

So having access to this level of information clearly helps team motivation from a challenge, a development and a recognition perspective.

Tayburn is another business that chose Synergist. Steven Clark, their Financial and Commercial Manager, told us that one of their top values is named *Better Together*:

"There's a buzz here. 'Better Together' means get the right people together from the outset, share things and collaborate with the best. We have 40 people here now. They all use Synergist and access the same data."

Deep Sangar, Production Manager of 30-strong time-based business, said:

"Synergist pulls everything together. The atmosphere is brilliant. It's removed a lot of admin. It's cleaned everything up. Made it slick. No more Post-It notes flying around! No more physical timesheets! No, we wouldn't go back to all that now."



Deep Sangar

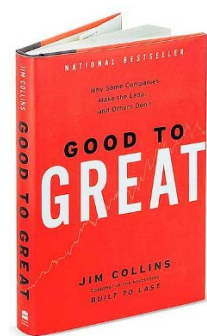
But let's not forget that the need for buzz and purpose doesn't only apply to the team. Ian Hughes of LHM told us:

"The biggest buzz for me? To be able to drive a company to success, make well-informed decisions every day, come up with innovations that create new opportunities for us, see client solutions and creativity working well, and watch our team becoming more empowered and working smarter all the time."

DRIVING CULTURE & ABILITIES

F. RUNNING EACH AREA 'LIKE A LITTLE COMPANY'

We mentioned [in a recent blog](#) that the best-selling business book *Good To Great* defined a characteristic of successful companies as having entrepreneurship at the individual level. In those companies identified as being far more successful than their peers, managers and staff were driven by an unrelenting inner sense of determination, with each individual functioning as if running a little enterprise. Personal empowerment and a deeply rooted personal investment in their own work and the company's success were also hallmarks.



How feasible is it for small companies to develop their culture in this direction? Phil Robinson, Founder and CEO of ClickThrough, thinks it is not only feasible but that implementing an agency management system can act as a catalyst for it.

He said of Synergist :

"It's helped us change our culture. Lisa's job [Director of Finance] has become more strategic, and people are empowered to run their own departments like proper little companies now."

Steven Clark, Financial and Commercial Manager of Tayburn, told us :



Content created by
ClickThrough

"And we give transparency to our teams, so they have the information they need to manage jobs properly."

"Today, designers, art-workers and account managers are knowledge workers, even mini-entrepreneurs, for us. The days of them doing isolated tasks in the dark are over."



Steven Clark, Tayburn

Talking of entrepreneurs, we'd like to congratulate the following four Synergist-using agencies who are all finalists for the *2015 Digital Entrepreneur Awards*. The awards 'reward the greatest minds in the UK's online industry, seeking out the hidden masters of the net, as well as high profile web leaders'.

- Amaze
- Mubaloo
- 383
- K2L



DRIVING CULTURE & ABILITIES

G. IMPROVING TEAM COLLABORATION

The state of the art on team collaboration isn't easy to summarise. If you key the words 'collaborative', 'work' and 'team' into Amazon to see which books help, you will be overwhelmed with alternatives. If you try Google you will discover that there are just nine team collaboration worth knowing. Or 7, 6, 5 or 3, depending which you click.

We decided instead to talk to business managers to see what their experience has been on the subject.

Steven Clark, Financial and Commercial Manager of Tayburn, told us about how everybody needs to see the same information source if collaboration is to work properly. He talked about his management system:

"It's all encompassing. You have to be able to see the big picture at a glance. We have 40 people here now. They all use Synergist and access the same data."

Lisa McLaren, Director of Finance at ClickThrough, told us that when extra resources become available they like to offer them to the team that has achieved the best record recently, as a bonus:



Lisa McLaren

"We can see when a department has earned extra hours of specialist time. They can allocate it how they need. That's very empowering."

Giving extra resources to the team on track might seem counter-intuitive, but it clearly works for them.

Simon Butler, co-founder of a London time-based business, spoke to us about the complexity

of throughput in a busy agency. Collaboration is all about having every member of the company connecting up:

"Every day, every person interacts with Synergist one way or another:

- *Allocating work by the team calendars.*
- *Staff resourcing*
- *Client services*
- *Reviewing job processes and profitability*
- *Management tracking: Client & project profitability*
- *Completing timesheets*



Simon Butler

David Ladds, Director of Bladonmore, would agree. But his emphasis regarding collaboration is on what the outcomes of the interactions are. To him, it's all about the choices that everybody has to make all day long:

"Every team member is constantly making decisions. Synergist gives us the tools to understand how we spend our time and how our clients use that time."

DRIVING CULTURE & ABILITIES

H. ACHIEVING HIGH TIMESHEET ADOPTION

Does anyone love filling in timesheets? We very much doubt it. Yet we talked to three Synergist-using agencies who mentioned they have high timesheet adoption rates. So what's their secret?

If you're introducing the concept to your consultancy for the first time you might want to give some thought to what Kent Valentine, Director of Draw, told us. They came up with an introductory solution that was fun, creative and effective:

"To get everybody on board regarding timesheets, we introduced a Timesheet Raffle. A spotless time-sheet week wins a ticket. We gave five prizes a month, including mystery prizes such as tickets to art exhibitions, cases of beer, salsa dancing classes or Amazon vouchers. Everybody fills them in now."



Kent Valentine, Draw

Andy Wainwright, Fifth Ring's Operations Manager, told us that accessibility and ease of use were the significant factors for them:

"Monthly agency financial reports are now a dream to produce, taking minutes rather than hours to deliver. Time sheets are accessible from wherever you happen to be, making the task more practical and less onerous for the creatives and the account management team."



Andy Wainwright

Steven Hunt, founder of consultancy Steven A Hunt & Associates, told us that if people see a real purpose in doing things, they do them:

"Our people weren't seeing any benefit to themselves from filling in the sheets. So it was a chore for them. In truth, we couldn't really demonstrate much benefit ourselves, because we couldn't show how it really affected the end result of a project."

"Getting our people to enter their hours was a bit of an uphill task. But when we explain that it helps us to be more selective about which jobs we take on now, that helps a lot. It means:

- Better margins
- Less stress
- Less time wasted on projects that don't even deliver for us
- Better salaries in the long run

"They feel more ownership with their projects now."

So for them, the answer to high adoption rates is to simply explain the payoffs for everyone.

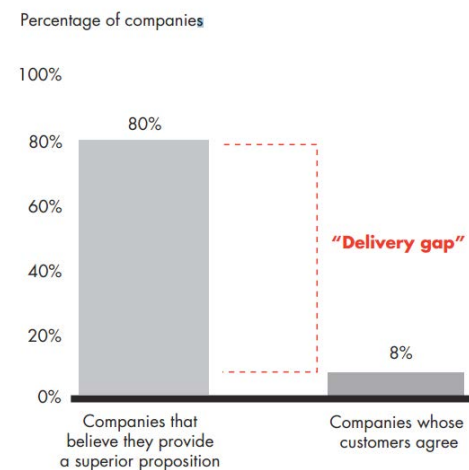


Client work by
Steven A Hunt
& Associates

DRIVING CONSULTANCY GROWTH

A. INCREASING CLIENT UPSELLING

Management consultants Bain & Company once published survey results saying that whereas 80% of companies think their service is superior, only 8% of their customers agree.



It's since become one of those legendary statistics that is quoted across the internet, even though the original report is now ten years old.

We mention it here because in the B2B community it's a given that client upselling can only be initiated when outstanding service is given in the first place. The problem is that clients don't always agree when such service has been delivered.

But apart from upping service levels, is there anything else that an agency or consultancy can do to encourage upselling? When we spoke to business managers using Synergist, at least two made the connection between implementing their Synergist consultancy management system and a rise in upselling.

What's the connection? For Lisa McLaren, Director of Finance & HR at ClickThrough, it's all about having the right information to share with clients. She told us:

"Upselling takes place now. Before Synergist, we wouldn't have been able to achieve that. Having the data makes all the difference."

It brings us back to client service. For some clients, delivering a step change in showing detailed information about project progress, time spent to date, landmarks achieved, automatic



Lisa McLaren

alerts and project health reports can be an eye-opener when their previous experience from suppliers has included almost none of these.

Steven Clark, Financial and Commercial Manager of Tayburn, agrees. For him, upselling is not just about having the information, it's seeing how team members develop with it and are inspired to recognise opportunities when the moment is right.

He told us:

"It's given them more of a sense of responsibility, more discipline. The team have become much more commercially minded now. They understand margins. It's also helped our account managers and account directors earn more from existing clients."



Steven Clark, Tayburn

4

DRIVING CONSULTANCY GROWTH

B. GAINING FINANCIAL CONTROL OF YOUR BUSINESS

Do you feel you have complete control over the financial aspects of your consultancy?

It's fascinating to hear how many businesses concede that they didn't have full financial control before they adopted a consultancy management system. It's certainly one of the most common things we hear when debriefing with Synergist users after implementation. Steven Clark, Financial and Commercial Manager of Tayburn, had this to say:

"What Synergist delivers in terms of financial control is fantastic."



Steven Clark, Tayburn

What's involved? Ashley Bliss, Financial Managing Partner at a 60+ strong project-based business, said:

"As a large marketing agency with multiple products and diverse services, it is critical that we remain in constant control of what is happening in terms of work progress and the resultant impact on finances."

"We were immediately able to access high quality detailed reports that told us everything we needed to know about job progression and any associated up-to-the-minute financial data."

"This encompasses all our internal and external costs and agency time and we can easily see where jobs are in terms of budget using the innovative traffic light system."

For Julie Cole, Financial Controller at environmental consultancy EDP, financial control includes the need to link data cleanly together:

"Compared with EDP's previous manual (Excel) processes, the seamless way that timesheets are automatically uploaded into the system is appreciated."

But that's only part of the picture she refers to:

"The integration with Sage accounts has assisted with recording sales, leading to quicker debtor analysis and debt chasing, therefore improving cash flow for the business. "Costings can now be analysed and lessons learned, leading to better project management in the future."

"Perhaps the single biggest benefit of all is the instant way we now get the overview of all the projects summarised together at any one time, showing values and work in progress."

The extent of the financial remit of the system is substantial. For example, in EDP's case all team members are now connected to the same project, time and expenses information. The system manages the following:

Timesheet and Expense Capture. Invoicing, including the drafting of invoices now quickly produced by the project managers. Project Financials (Fee, Costing, WIP). Reporting, including time and utilisation reports. Seamless integration with their accounts System Integration. Post-project reviews. Consultant Utilization Reports acting as a key indicator in monitoring the business performance as a whole. Project reports available to Project Managers, analysing chargeable work against fee proposals, and showing variations in pounds and percentage.



EDP team



Client work by EDP

DRIVING CONSULTANCY GROWTH

C. IMPRESSING PROSPECTIVE CLIENTS

Can your consultancy management system help you win new work?

Business managers using Synergist tell us that there's more to impressing prospects than the quality of the work itself. Increasingly, clients are expecting proof of process.

Steve Laird, Finance Director of consultancy On Line Design & Engineering Ltd, explained that clients increasingly want to put their mind at rest that they can trust the communication of key project information, something that only a comprehensive system can provide. They installed Synergist.

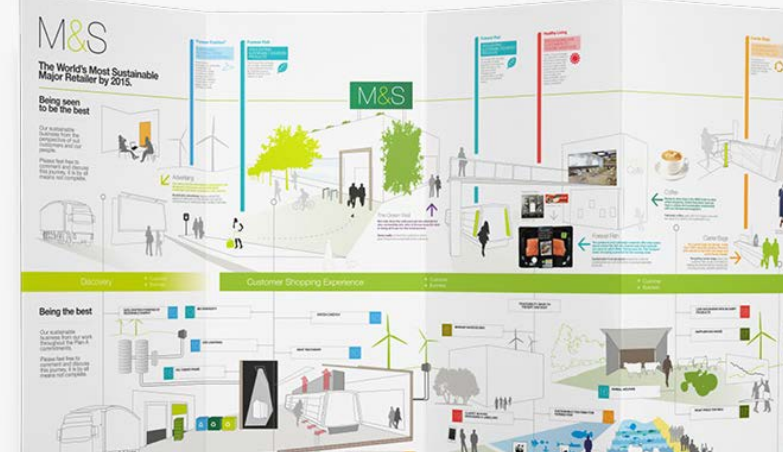
"Our clients like it and we have some huge clients, like ConocoPhillips, Total and TATA. They like the way we can give them details of time and costs on projects. Today, they want a certain level of transparency, and they demand periodic audits, where they come in and analyse the entire system. We sail through those audits every time."



Client work by
OnLine Design &
Engineering

Matthew Fairweather, founder of the creative design firm in his name, told us that detailed project information is needed by both sides of the equation:

"Clients need to know where we are and how much we are spending, and we need to keep up with profit levels, time spent and the degree of progress on individual jobs. Having made the decision to install Synergist we have not looked back".



Client work
by Matthew
Fairweather

Why do clients demand this level of information and proof of its robustness? What's in it for them? We would say that there are five characteristics of a good management system that clients are beginning to expect to see evidence of:

1. Perception of transparency.
2. Proof of robust tracking mechanism.
3. Automatic alerts giving early warnings of problems, giving time to act.
4. Efficient processes, leading to leaner agency organisations with lower overheads, less time wasted on administration and better focus on clients.
5. Customer queries answered fast and accurately. No more waiting for someone to search for the information.

Chris Ross, MD of RLH, believes that trust is at the heart of it all. One reason they implemented Synergist was to help their procurement processes:

"Our client procurement teams are also happy. That's because we are transparent and so we're seen to be trustworthy."



Client work by RLH

4

DRIVING CONSULTANCY GROWTH

D. SEIZING THE MAGIC MOMENT FOR GROWTH

Are there magic moments of decision-making in business? Do you ever hear a crack of thunder to tell you that *Now Is The Special Time To Decide?* Sadly, no.

But there clearly are turning points in any consultancy. How should you approach such moments? We asked four business managers about it. All use Synergist today.

Gareth Moore, Chief Operating Officer of a project-based company told us:

"A key element of success is in seizing the moment. You have to look yourselves in the mirror and decide what you want to create. You have to decide to make it happen. Everything flows from that."



Gareth Moore

Mark Beaumont, founder of a Manchester time-based business would surely agree. He said:

"There comes a time in every agency's life when you stand back and have to decide where you want to take it. Do you want to just carry on being a neat SME, trying to navigate the ups and downs? Or do you want more than that from it?"

"We decided to get serious. Preparing the agency for growth, getting the basics right, making sure you've got the right people with the bigger picture mind-set, having them run proper little cost centres and so on... and getting a serious system to drive through the efficiencies, give you what you need and be able to grow with you. These were long-term decisions. Getting Synergist was a key part of it, and I'm glad we did it."



Mark Beaumont

Simon Butler, co-founder of Purestone, told us that sometimes such decisions take place when you are setting up the agency in the first place:

"We planned from the outset that ours should be a growth business, not a lifestyle business. Synergist allows us to scale. It also helps us know what sort of projects we can take on. It tells us our current capacity as a business."



Simon Butler

But as for finding the mythical magic Moment of Truth when deciding to grow, or even when to get a consultancy management system, Steve Revell, Managing Director of consultancy Maleon told us:

"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!"



Client work by Maleon

DRIVING CONSULTANCY GROWTH

E. MAKING A CONSULTANCY SCALABLE

By **'scalable' we mean having** the ability to support a company growing from (say) 15 or 20 people right up to several hundred, all with exactly the same software.

Not every consultancy management system is capable of handling that level of growth. We talked to a number of business managers who have had to deal with the issue, and who decided to take Synergist. Rob Hill, Managing Director of HMA, told us about their previous system:

"It wasn't scalable. We needed a system that would take care of the business agency fundamentals and allow us to grow when we chose to."

He also talked about the type of growth he was planning. Gone are the days when companies simply grow. What type of growth was HMA looking for? He told us:

"One big reason for implementing Synergist was to avoid wasting so much time running the mechanics of the agency when we want to focus purely on clients. So, when planning our growth we went for 'lean growth.'"

Scalability is one of the most commonly-cited reasons that our users give when choosing Synergist. For example, managing growth was high on Tayburn's agenda, as Steven Clark, their Financial and Commercial Manager, told us:

"Synergist gives us scalability. It's all about growth. It makes growth more manageable."

Many of our users have indeed turned out to experience impressive growth levels. Steve Laird, Finance Director of consultancy Online Design & Engineering Ltd, told us:

"While with Synergist, we've grown from a £12m-£13m company to one that is about three times that size. Synergist has played a part in that."

For some, 'scalable' means 'scalable processes'. Mubaloo, another Synergist user, have become the UK's leading mobile consultancy. Having robust processes are important to them:

"When working with FTSE 250 companies, you have to prove that you can do complex work, satisfy client requirements and always be professional. This comes from having the right processes and systems in place that grow with your business."



Client work by
Mubaloo

For others, scalability is more about removing bottlenecks. Nigel Wilson, the Managing Director of another project-based business, explained:

"Synergist has helped us be more scalable. People are more empowered now. Decisions that used to drop relentlessly into my lap every day are now taking place with no fuss. That's a payoff that keeps on paying."

David Ladds, Director of Bladonmore, has an uncomplicated way of looking at scalability:

"Thoroughly understanding time and the value of time is key. For us to have scale we need to know exactly how we spend our time. It's that simple."

We do of course recognise that growing a consultancy involves far more than the choice of the business management system. However it can be seen as having a pivotal role. Gareth Moore, Chief Operating Officer of a 46-strong time-based business, had this to say about it:

"Synergist is the foundation of our business growth."

DRIVING CONSULTANCY GROWTH

F. DELIVERING ON YOUR AGENCY'S AMBITION

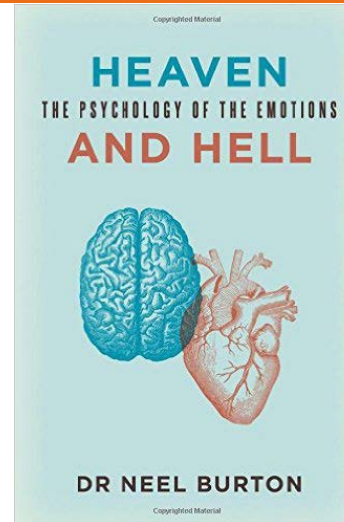
Consultancies aren't ambitious but people can be. Of course a company's character always comes from the person at the top.

So what is ambition, exactly? In his much-praised book *Heaven and Hell: the psychology of the emotions*, psychiatrist and philosopher Neel Burton says:

- Ambition involves the desire for achievement and the determination to strive for its attainment even in the face of adversity and failure.
- Unlike mere aspiration, which has a particular goal, ambition is a trait and is persistent and pervasive.
- Having achieved one goal, the truly ambitious person soon formulates another for which to keep on striving.
- Greed reduces focus to the pursuit of its object. Ambition is more flexible and far-reaching, and can enable us to flourish and contribute to the flourishing of others.
- Beware ambitious people who are blocked. Francis Bacon said that as long as they go unchecked they are busy rather than dangerous; but if they are held back they 'become secretly discontent, and look upon men and matters with an evil eye, and are best pleased when things go backward'.
- A person is not truly ambitious unless he is willing to make sacrifices in the name of his ambition.
- Studies show that ambitious people attain higher levels of education and income, build more prestigious careers, and, despite the noxious effects of their ambition, report higher levels of overall life satisfaction. Owing to chance and foolishness, most ambitious people end up falling short of their ambitions, but that still lands them far ahead of their more unassuming peers.

So much for the theory. How does this play out in the reality of managing a business? And can getting a consultancy management system contribute in some way?

Gareth Moore, Chief Operating Officer of a project-based business, noticed that when they were implementing their new system the process itself had an effect on their level of ambition:



"Getting Synergist was at the very beginning of our more ambitious thinking. At that time, we stood back and thought through our production process for the Synergist implementation, and it made us realise just how much we wanted to grow."



Gareth Moore

Steve Lawrence, Operations Director, LHM, had a slightly different angle. One of his motivations for installing Synergist is that your level of ambition will necessarily involve sacrifice. So you owe it to yourself not to make things any harder than they need to be. He told us:

"You don't run an agency if you want an easy life. Agency life is hard work. You put in the hours. You work hard to produce the best results for clients and you're ambitious for the agency. That's why it makes sense to put everything in place to make it as streamlined as possible".



Steve Lawrence

We'll end this topic with a quote from the great Marcus Aurelius. To him, no less than how you measure a person is tied in with their ambition.

A man's worth is no greater than the worth of his ambitions.

That raises the bar a little...

DRIVING CONSULTANCY GROWTH

G. CONTINUOUSLY DEVELOPING AN AGENCY

When London project-based company Draw implemented their Synergist system they realised that it offered an unexpected bonus. Kent Valentine, a Director, told us:

“It all stems from something a teacher once told me: ‘Kent, if the world isn’t a better place for you doing what you do, then you’ve no right to do it.’ This was both a revelation and an inspiration — the idea that continual improvement should not only be baked into what we do, but that it’s also our responsibility.

“We have picked this up at Draw because it speaks to both what we do (making things, better than other people do), and our belief in iterative improvement and transformation.

“The concept of marginal gains in elite sport was made famous in the London 2012 Olympics when Team GB cycling won a record 8 gold medals. It’s all about making aggregated small gains in many areas to improve overall performance, sometimes with massive results. Our new system makes it easy for us to do precisely this now.”



Kent Valentine, Draw

How feasible is it for the principle of marginal gains to be applied outside of sport? One example is the ease with which it has been embraced by the education world. Alex Quigley, an English subject leader at Huntington School, York, wrote a blog [published in The Guardian](#):

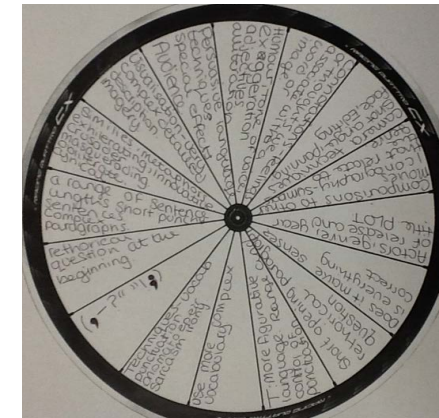
“One simple, but highly effective, lesson learnt from the Olympics has been taken from the story of the brilliantly successful cycling team, and their visionary coach, Dave Brailsford. Brailsford believes that by

identifying every tiny aspect of an athlete’s performance and then making just a 1% improvement in each area the athlete’s overall performance can be significantly enhanced.

“His concept of ‘the aggregation of marginal gains’ has been making transformative ripples in classrooms and schools ever since.

“What is so brilliant about Brailsford’s marginal gains concept is that it is so darn flexible. It provides an accessible, precise and useful language for achieving success in a school context in various ways. It can be a tool for sustained improvement from students improving their learning to school leaders looking to make small but highly significant improvements.”

Appropriately, he uses a wheel concept to list an individual’s areas for improvement:



“My GCSE students were soon spinning their wheels and speaking with the self-reflection of a highly trained Olympian athlete - well, nearly. They really did improve their ability to self-assess their learning and take real ownership of their own ambition.”

So the concept’s universality seems assured. From an consultancy’s perspective, what Kent Valentine is saying is that Synergist delivers the information that makes continuous improvements measurable and manageable by the team, and it delivers results.

It is not known whether Dave Brailsford expected the tool he popularised would not only win gold medals for Team GB, help pupils write better English essays, win him a knighthood and help consultancies be more successful. Quite an achievement.



Manchester Velodrome, the National Cycling Centre

DRIVING CONSULTANCY GROWTH

H. HANDLING NEW BUSINESS OPPORTUNITIES

When we ask our clients why they decided to get a consultancy management system, they rarely mention that it is to help manage new business opportunities. It's just not usually in the centre of their radar.

So it tends to be one of those nice-to-haves, almost as a by-product of getting the system. It's talked about as being part of the big picture. Here's what Gareth Moore, Chief Operating Officer of a 46-strong project-based business told us:

"Synergist delivers powerful data, including the management of the production process, the new business opportunities, the invoices, statistics, everything."

"Synergist feeds into everything we create and do and use, right up to Board level."



Gareth Moore

Sarah Weller, Managing Director (London) of leading mobile consultancy Mubaloo, also sees it as a part of the whole:

"Synergist helps us throughout our whole process. From monitoring our lead generation, pipeline and new business activity all the way through to setting up client projects and monitoring their health."

So what's involved in managing new business?

Synergist's approach is to help you:

- manage and follow up your new opportunities
- track all leads and see they have been effectively followed up
- create action and to-do lists with email reminders for follow ups needed
- view sales to both new business and repeat business opportunities - with a drill-down of details
- new business reporting and analysis to help overall business forecasting

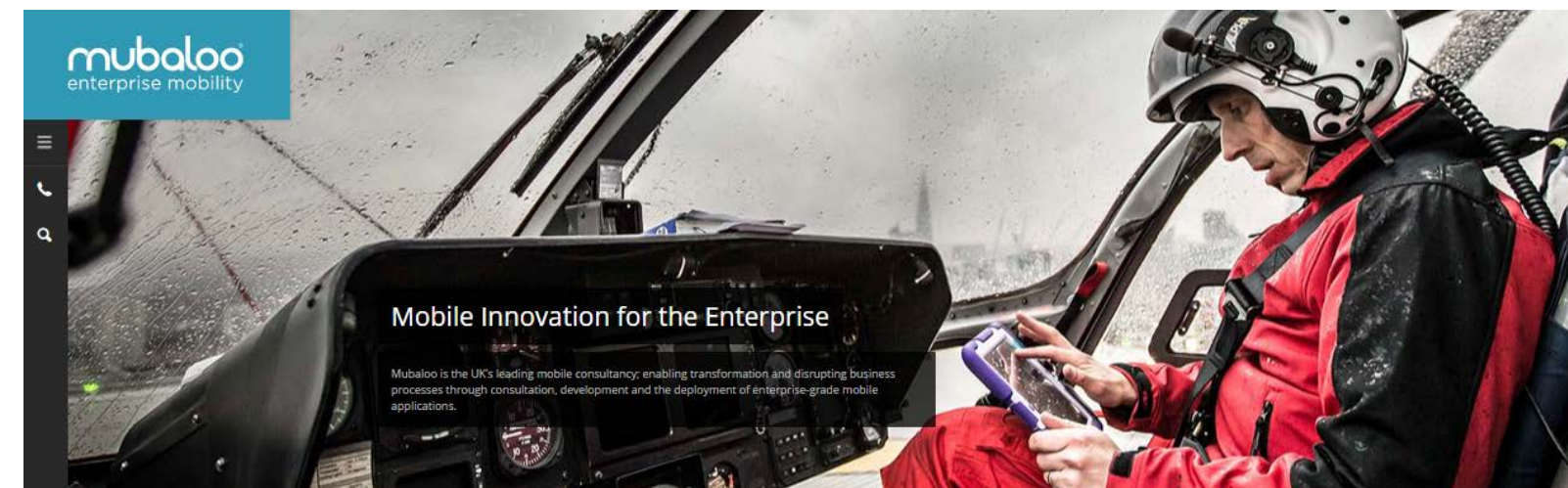
Sarah Weller explained the frequency that they check their new business opportunities at Mubaloo.

"We check the business pipeline weekly with Synergist – it's essential. Which projects are 95% likely to come in? 75%? 50%? It helps us decide what resources we need to start pencilling into projects."

"Things happen fast here. You have to keep on top of it."



Client work by Mubaloo



DRIVING BUSINESS EFFICIENCIES

A. CREATING LEANER PROCESSES

'Lean Processes' is a powerful concept that has initiated a vast body of research across industries over the past decades. How does it apply to agencies? Rob Hill, the Managing Director of HMA, summed it up best after he implemented Synergist in his agency:

"Everybody's familiar with 'lean manufacturing' and 'lean startups'. I think clients are increasingly expecting their agencies to be lean too. Nobody wants to pay for bloat."

We quote the [Lean Enterprise Institute](#):

"A lean organization understands customer value and focuses its key processes to continuously increase it."

"Eliminating waste along entire value streams, instead of at isolated points, creates processes that need less human effort, less space, less capital, and less time to make products and services at far less costs and with much fewer defects, compared with traditional business systems. Also, information management becomes much simpler and more accurate."

"A popular misconception is that lean is suited only for manufacturing. Not true. Lean applies in every business and every process. It is not a tactic or a cost reduction program, but a way of thinking and acting for an entire organization."

Because they avoid waste and embrace efficient processes, lean agencies deliver better value and service to clients. Deep Sangar, Production Manager a project-based business, told us after their Synergist installation:

"It's removed a lot of admin from [the team]. It's cleaned everything up. Made it slick. No more Post-It notes flying around! No more physical timesheets! No, we wouldn't go back to all that now."

Paula Murray, Financial Controller at Leith, also told us about time savings they achieved in their firm:



Paula Murray

"The previously laborious month-end procedures, requiring 10 days of long hours are now completed in 5 days, even though the volume of work passing through the agency has almost doubled."

"Even better, this is being achieved without having to work late due to the massive improvements in efficiency Synergist has brought to the accounts department"

MD Nicky Thompson Blue Chip Marketing

"Year-end job bag closing used to take up to 2 months of Account Handlers time to complete and, at its peak, disrupt the smooth flowing of the office. With Synergist, we can't even tell it is happening. Last year was done and dusted within 2 weeks – amazing!"

The pure time saving can be very significant. Steve Lawrence of LHM told us that their studio now saves 15 hours a month compared with their previous system, and their management team saves 25 hours per month. For details, see the Saving Time section of this document or see their case study.



Nicky Thompson

DRIVING BUSINESS EFFICIENCIES

B. REPLACING A TROUBLESOME SYSTEM

Sad to say, one of the issues facing many consultancies today is their lumbering current system. We could fill a book with woeful tales, unfortunately. Instead, let us simply list what a few business managers told us about their previous experiences before choosing Synergist.

First up is Steven Clark, Financial and Commercial Manager of Tayburn, who told us of their old system:

"It took an enormous amount of time to sort out each month. We only found out what was really happening after the event, when of course it was too late."

Ashley Bliss, Financial Managing Partner at another project-based business, related that their previous system...:

"...was proving to be complex in everyday use and rather expensive to operate with high recurring software fees."

Matt Fairweather, founder of the company in his name, said that their old system:

"...did not have the flexibility or levels of reporting we needed to keep fully up to date with all our activities."

Steve Laird, Finance Director at consultancy Online Design & Engineering said:

"We previously used an in-house system. But it was unreliable and insufficient."

Andy Wainwright, Operations Manager at Fifth Ring, explained that their system:

"... was based on a proprietary database product that had been modified over some years. This was proving to be both time consuming and cumbersome."

Paula Murray, Financial Controller at The Leith Agency, told us they identified a problem with a lack of visibility and control over project budgets and costs. This was caused by the poor performance of their rapidly ageing project management system, resulting in the accounts department having to work late 10 days every month to close off the accounts.

Julie Clare, Chief Executive of Clear, told us that previously they had a management system in



Julie Clare

place but staff were finding it clunky to use. What's more, time sheets were difficult to fill in and there was no interface with Sage so sales and purchase invoices had to be entered twice, leading to possible errors.

Finally, Steven Hunt, founder of consultancy Steven A Hunt & Associates, told us:

"We made our decision, and placed an order for a system. We used it for one month, and sent it back. It didn't nearly deliver what we needed. They weren't solving the problem."

"So we searched some more, and had a number of demonstrations. Eventually we chose Synergist, in October 2014. It was more expensive than some others, but we saw it as an investment. We could see there was value there."



Steven Hunt

What's the conclusion to all of this? In three little bullet points we would simply say:

- Not all systems are the same.
- Choose with care. Get something that is scalable, growing with you.
- Speak to users.

DRIVING BUSINESS EFFICIENCIES

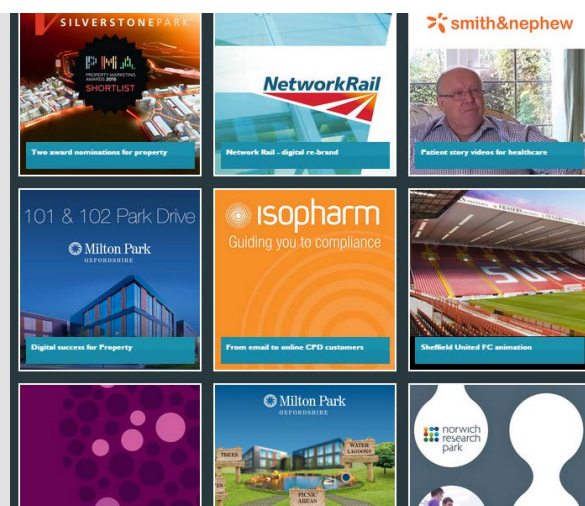
C. ATTAINING OPTIMAL SCHEDULING & UTILISATION

What can you expect to get from a scheduling and utilisation system? Here is a mini-checklist of some things to look for:

- Link between timing plans and estimates to scheduling to avoid any re-keying
- Account handlers can directly submit work requests into the system
- Instant visibility of current and planned loading on all resources and teams
- Easy drag-and-drop process of tasks onto resources using an intuitive visual interface
- Due dates can be highlighted when allocating tasks to resource
- When your timing plan changes, scheduling issues can be automatically highlighted
- Under- or over-loading can be highlighted with clear colour coding
- Option of read-only visibility of planned schedules for account managers
- Diary view of an individual's allocated task, and pre-populated timesheets
- Email alerts of new tasks allocated
- Team diary option

Nicola Tiffany, Client Services Director of HMA, thinks of scheduling in terms of tracking both past and future:

"Synergist has streamlined our information... how we report on what has happened and also how we plan for the future (billing plans, scheduling)..."



Some HMA clients

Whereas a couple of business managers focus on the ease aspect. Simon Butler, co-founder of London project-based company Purestone, told us:

"Accessing information, such as staff utilisation, is now done at the push of a button. It's powerful."

And Julie Clare, the Chief Executive of Clear:

"Time is really easy for the staff to record which means it is recorded more accurately. Another huge advantage is that it's helped with capacity planning and staff utilisation."

Steven Clark, Financial and Commercial Manager of Tayburn, mentioned that utilisation is not only for client projects but for pitch work too:

"Synergist pulls everything together. We track income, work in progress, cost overruns, margins, time utilisation, profitability analysis – everything comes from Synergist."

"Investment in doing a pitch is now completely visible. Time, travel, expenses, staff utilisation, it's all in there. The team understand how it all fits together. So pitches are managed properly."

And some businesses place the system's scheduling capabilities as one of the biggest reasons for choosing a system in the first place...

Ashley Bliss is Financial Managing Partner at one such company.

"Synergist was also selected for its superb scheduling capabilities."



Ashley Bliss

DRIVING BUSINESS EFFICIENCIES

D. LINKING TO ACCOUNTING

When your chosen consultancy management system automatically links to your favourite accounts package you have the best of both worlds. Your team and your auditors can continue to use the accounts system they all know so well. Yet you gain all the benefits of the optimal management system that best meets your needs. The two integrate fully, so data is never entered twice.

The simplicity of that solution is what many users comment on to us. Ashley Bliss, Financial Managing Partner at a project-based firm, commented on their Synergist implementation:

“The direct link to our Sage Accounting package makes life easy.”

Andy Wainwright, Fifth Ring’s Operations Manager, told us about the smoothness of the link between the two:

“Full compatibility with our Sage Accounts software rounds off the seamless integration.”

John Wilford, Managing Director of another time-based business, remembers how their previous system used to be, and why they started looking for a new system in the first place:

“One of the main triggers was that we were really rubbish at doing accruals. This meant that profitability was up and down. When we weren’t doing accruals properly, our figures never matched what we thought we’d done (on profit). Now they do. Which is really important. If you make decisions to spend money and they’re on the basis of false numbers, it’s no good.”



Client work by Rave

Julie Cole, environmental contant EDP’s financial controller, had this to say about Synergist:

“The integration with Sage accounts has assisted with recording sales, leading to quicker debtor analysis and debt chasing, therefore improving cash flow for the business.”

Which accounts systems can SYnergist link to? The current list includes the following:

- Sage 50
- Xero
- Sage 200
- Sage ACCPAC
- Access Accounts
- Sun Systems
- IRIS Exchequer
- KashFlow
- Microsoft Dynamics-GP
- Agresso
- MYOB
- QuickBooks
- Pegasus Opera
- Dream

Aimsough Group Arsenal Football Club Badminton Estate Barratt Homes Barwood Development Securities Barwood Homes Bathurst Estate Bellway Homes Bewley Homes Broadgate Homes Bloor Homes Bovis Homes British Solar Renewables Catesby Property Group DPDS Dulas EcoEnergy Gallagher Estates Graham Warren Hallam Land Management Mansour Properties Harvington Properties Home Builders Federation Honda (UK) JJ Gallagher Lioncourt Homes Linden Homes Magdalen College, Oxford Martin Grant Homes McLoughlin Planning Montaggart & Mickel Miller Strategic land Miller Homes Network Rail Ova Wind Renewables Paul Newman New Homes Persimmon Homes Queens Park Rangers FC SAC Redrow REG Windpower Renewable Energy Systems Rolls Royce Savills ScottishPower EnergyNetwork Scott Brownrigg Architects Solar Planning Somerset County Cricket Club St Modwen Developments Staffordshire Police Taylor Wimpey Temporis Wind Thomas Water TNEI Services Tottenham Hotspur Football Club Trinity College, Oxford University College School Village Green Wates Group Welbeck Land West Berkshire Council White Young Green

EDP client list

DRIVING BUSINESS EFFICIENCIES

E. INTEGRATING THE FINANCE FUNCTION BETTER

Naturally consultancy management systems integrate the finance discipline with the operations side. That's a given, but that's not what we're talking about in this section.

Links at the system level are one thing, but a collaboration at the people level as well — that's something else.

It's such a radical concept that many businesses never quite achieve it. Employees in different departments can lack a common ground, even a vocabulary, with which to converse constructively.

Fortunately we've seen a way to solve it. The very act of getting a consultancy management system can be the breakthrough in this. We'll let a business using Synergist explain. Lisa McLaren, Director of Finance at Clickthrough, told us that Finance was separate from the rest of the business:

"As finance director I was nervous getting Synergist at first. I was in my own little world. Not now. Everything's connected, visible, transparent."

So before their new system arrived, the finance function can be seen by the troops as a separate world, populated by people who chase expense forms and timesheets and answers about delayed invoices and so on. People to avoid, in short.

Steven Clark, Financial and Commercial Manager of Tayburn, summarises it best when he explains that their previous system was "clunky, horrible":

"I used to have to sit down with the account managers every month and ask questions like 'Why is this job over?' and 'Why have we not billed this one?' and it took an enormous amount of time to sort out each month. We only found out what was really happening after the event, when of course it was too late."

But that changes when everyone has access to information. Steve Collins, the Finance Director at a major international project-based company, told us:

"Synergist sits at the centre of everything we do, operationally and financially."

As a result, everyone sees the financial impact of their own actions. They see that everything is linked together. It can be an eye-opener to some team members. Steven Hunt, founder of consultancy Steven A Hunt & Associates, told us:

"We showed one engineer the traffic lights of his project, and it was a genuine revelation for him. Before, the guys just got on with the jobs, with no connection as to how much it helped the business as a whole."

So now, when the Finance Director walks up to someone's desk, an entirely different conversation takes place. It's peer to peer, adult to adult.

Both can see the same information, and both are contributing to the health of a project and the contribution to the business. Both are on the same side at last. It's the next generation on from systems that give only the most literal integration of data between finance and operations and yet don't help to bridge the old gaps between them.



Client work by
Steven A Hunt

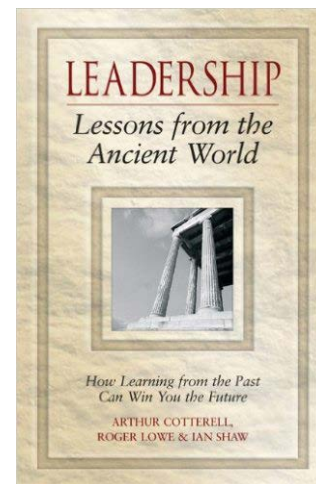
DRIVING BUSINESS EFFICIENCIES

F. FINE-TUNING TARGETS

What's the best way to set a target?

In the 2006 book 'Leadership Lessons from the Ancient World: How Learning from the Past Can Win You the Future', the authors Cotterell, Lowe and Shaw say:

W. Edwards Deming, a 'quality guru' from an earlier era in management thinking, explained perceptively some 50 years ago that 'People with targets and jobs dependent upon meeting them will probably meet the targets, even if they have to destroy the enterprise to do it'.



Destroy the enterprise? It's a chilling notion. But it has the ring of truth about it. But does it mean that all targets should be abolished?

There are plenty of pundits who would love to see targets reduced. Government-based targets in health and education are two classic examples. But it's hard to imagine a commercial world without any targets. How could an enterprise plan for growth without having some numbers that everyone's going for?

So the question is: Can targets be handled in such a way as to avoid all the negatives and deliver helpful results for all concerned?

When we met with Lisa McLaren, Director of Finance at ClickThrough, they had brought Synergist into their company. She reported that the new methods have altered the way

targets are implemented and perceived there:

"It's also helped with fine-tuning targets. It's removed all the debates and emotions – it's all factual now. We discuss the benchmarks with each department."

To help communicate the positive nature of the exercise, they launched an initiative which gave teams tangible benefits.

"We can see when a department has earned extra hours of specialist time. They can allocate it how they need. That's very empowering."

It's an example of how transparency can help change to occur.

So the moral to all this is this: If you're going to set targets in your agency you have to make sure they are...

- Fair, sensible and defensible, and seen to be so via data transparency
- Achievable
- Communicated with total clarity
- Delivered alongside real benefits to those achieving them
- Avoiding the 'hit your targets or perish' trap



Clients of ClickThrough

DRIVING BUSINESS EFFICIENCIES

G. REDUCING INTERNAL CONFLICT OVER RESOURCES

Every company has internal debates over resources. They often happen on a Monday morning. It's a lively start to the week.

The scarce resources they debate over are usually people or equipment or budget. What's the best way to resolve these disputes?

There is one time-honoured way. It's called:

He who shouts loudest wins.

However it may be time-honoured but it obviously isn't the smartest way. It results in poor prioritising, bad client decisions, internal grievances and good people leaving. So what's to be done?

A July 2015 article in PR Week focused on whether content creation staff in PR firms should all be in one team or whether they should be distributed across the account teams. Paula Cavagnaro, SVP of Bateman Group, said:

"Including content specialists on accounts means there are no internal fights over resources or hours. We're all working for the client in unison, offering the best possible strategy and service, regardless of what percentage is content versus media outreach and traditional PR activities. This ensures high-quality content leads the way."



No doubt such organisational tweaks can make a difference, but the larger problem of internal conflict over resources remains.

The manager of a 45-strong project-based company that implemented Synergist told us:

"It used to be a bun-fight in the studio to decide which job was going to get which resources. Imagine: over 20 people, and the one who shouts loudest wins.

"Not now: it's all transparent. Everybody can see everybody else's priorities and workload."

This links to the wider idea of information transparency improving decision making, something that we see over and over in our conversations with business managers.

Consultancy life is stressful enough without creating unnecessary internal barriers. Making team members yell louder than their own colleagues to win needed resources for their client sells everyone short, not least the client. However when everyone sees the same real-time information they are in a far better position to reason their way through it.

Not that it will stop some people shouting louder than others. Some folks are just like that. However with the right information system the shouting doesn't really help so much.

Besides, sometimes the most effective results come from the quietest source. Advertising guru David Ogilvy was responsible for what is sometimes referred to as the most famous headline in advertising history. Quietness can speak volumes...

"At 60 miles an hour the loudest noise in this Rolls-Royce comes from the electric clock." (1958 Rolls-Royce print advertisement).

"At 60 miles an hour the loudest noise in this new Rolls-Royce comes from the electric clock"

What makes Rolls-Royce the best car in the world? "There is really no magic about it—it is merely patient attention to detail," says an eminent Rolls-Royce engineer.

1. "At 60 miles an hour the loudest noise comes from the electric clock," reports the Technical Editor of *Time* magazine. The silence of the engine is uncanny. Three mufflers tune out sound frequencies—occasionally.
2. Every Rolls-Royce engine is run for seven hours at full throttle before installation, and each car is run-driven for hundreds of miles over varying road surfaces.
3. The Rolls-Royce is designed as an owner-driver car. It is eighteen inches shorter than the largest domestic cars.
4. The car has power steering, power brakes and automatic gear-shift. It is very easy to drive and to park. No chauffeur required.
5. There is no metal-to-metal contact between the body of the car and the chassis frame—except for the speedometer drive. The entire body is isolated and under-sprung.
6. The finished car spends a week in the final test shop, being fine-tuned. Here it is subjected to 98 separate checks. For example, the engineers use a microscope to inspect for self-wisdom.
7. The Rolls-Royce is guaranteed for three years. With a new network of dealers and parts-depots from Coast to Coast, service is no problem.
8. The Rolls-Royce tradition has never changed, except that when Sir Henry Royce died in 1933 the messageman *Hi* was changed from red to black.
9. The coachwork is given five coats of primer paint, and hand rubbed between each coat, before finishing coats of finishing paint go on.
10. By moving a switch on the steering column, you can adjust the shock-absorbers to suit road conditions. (The lack of fatigue in driving this car is remarkable.)
11. Another switch deflates the car window, by heating a network of 1500 invisible wires in the glass. There are two separate circulating systems, so that you can ride in comfort and silence with all the windows closed, the conditioning is optional.
12. The seats are upholstered with eight hides of English leather—enough to make 120 pairs of silk shoes.
13. A picnic table, mounted in French walnut, slides out from under the dash. Two more swing out behind the front seats. The backrests on the front seats are individually adjustable.
14. You can get such optional extras as an Exports coffee-making machine, a detinting machine, a bed, hot and cold water for washing, an electric stove or a telephone.
15. You can lubricate the motor chassis by simply pushing a pedal from the driver's seat. A gauge on the dash shows the level of oil in the tank.
16. Gasoline consumption is remarkably low and there is no need to use premium gas, a happy economy.
17. There are two separate systems of power brakes, hydraulic and mechanical. The Rolls-Royce is a very safe car—and also a very steady car. It cruises serenely at eighty-five. Top speed is in excess of 100 m.p.h.
18. Rolls-Royce engineers make periodic visits to inspect owner's motor cars and advise on service.

Jet Engines and the Future
Crested airlines have chosen Rolls-Royce engines for their Boeing 707's and Douglas DC8's. Rolls-Royce propellers are in the Viking Viscount, the Lockheed F-127 and the Grumman C-119.

Rolls-Royce engines power more than half the motor-yachts and propeller airplanes supplied to or on order for world airlines.

Rolls-Royce now employs 42,000 people and the company's engineering experience does not stop at motor cars and jet engines. There are Rolls-Royce diesel and gasoline engines for many other applications.

The large research and development resources of the company are now at work on many projects for the future, including missiles and rocket propulsion.

ROLLS-ROYCE AND BENTLEY

19. The Bentley is made by Rolls-Royce. Except for the radiators, they are identical motor cars, manufactured by the same engineers in the same works. The Bentley costs \$300 less, because its radiator is simpler to make. People who feel different about driving a Rolls-Royce can buy a Bentley.

20. The car illustrated in this advertisement—i.e., principal price of only—costs \$13,500.

If you would like the prevailing experience of driving a Rolls-Royce or Bentley, write or telephone to one of the dealers listed on page 54. Rolls-Royce Inc., 10 Rockefeller Plaza, New York 20, Circle 5-1144.

DRIVING BUSINESS EFFICIENCIES

H. DOING INVOICES FASTER & MORE ACCURATELY

The time saved with system-generated invoices is one of those ROI exercises that users like to talk about a lot. The reason is that the before-and-after benefits are so clear cut.

Michelle Earl is Managing Director of Earl & Thompson. She said:

“An example of the significant difference made by Synergist is in client invoicing. Previously we would have spent the equivalent of 10 working days just creating the individual client invoices. Today the same job can be completed by one person in less than a day.”

And Ian May, Programme Director at another time-based business, told us

“Invoicing used to have to be retyped. Synergist has brought speed and efficiency.”

Gareth Moore, their Chief Operating Officer, told us that improved speed isn't the only issue:

“Before Synergist, it turned out that we had a loophole. Sometimes, jobs could go all the way through the studio and not get invoiced. We were completely unaware of that before.”

Julie Clare, Chief Executive of Clear, recognised that issue:

“One problem that Synergist has helped to eliminate is any potential for missed charges. They occasionally used to find costs on jobs they hadn't accounted for, such as invoices coming in months later.”

Andy Wainwright, Fifth Ring's Operations Manager, said.

“Invoicing has become much slicker and being able to properly manage purchase invoices against purchase orders for the first time completes the financial picture.”

Lorraine Lee, Financial Controller at Blue Chip Marketing, told us:

“Purchase order raising is a very good feature of Synergist – and invoice

production – I love that too. Sometimes invoice numbers were duplicated on the manual system, whereas with Synergist you can't do that, so that's cut out a whole area of worry.”

Lorraine also mentioned that she finds the billing plan very useful because it highlights if any invoices haven't been raised.

Company Director Lee Day of RDJA talked about the process improvements:

“Our invoice process is now instant – job details feed into Sage which is a really slick functionality.”

Steve Laird, Finance Director of Online Design & Engineering Ltd:

“It shows what's been invoiced, what's not been invoiced, work-in-progress reports and timesheet listings.”

“One of the functions which has proved to be invaluable is the ability to invoice multiple jobs for a client, thus reducing the amount of time and invoices raised.”

“In addition to integrating with our accounts software, Synergist also has the ability to produce and print invoices. This has saved an enormous amount of time within our accounts department since they do not actually have to produce invoices now.”

Steven Clark, Financial and Commercial Manager of Tayburn, told us of a cash flow gain with the system:

“We create draft invoices based on quotes, purchase orders and so on. We get monthly invoices sent out by the 2nd of the month.”

“But why wait until the end of the month? We can now get them out at the end of a project. We never used to be able to do that.”

DRIVING THE CONSULTANCY

A. REVEALING UNSEEN BUSINESS PATTERNS

You don't need big data to uncover important information for your business. Your consultancy management system delivers on it all the time.

As an example, Lisa McLaren, Director of Finance at Clickthrough, told us about a spin-off benefit from their Synergist system:

"We also see patterns in the over-servicing now. For example, by client type. Very Useful."



ClickThrough award

We see business pattern discovery as a hidden by-product of Synergist rather than a primary reason that consultancies choose a system. It's one of those positive unintended consequences in life that happen perhaps all too rarely.

What types of patterns can emerge? Users have told us of various types.

- Positive trends that emerge over time, for example in types and sources of opportunities.
- Negative trends that surface, such as declining margins.
- How different client types (e.g. size) affect key performance indicators.
- Geographical implications.
- Impact of different types of project on workloads, e.g. contracted resources.
- KPIs by team.

- Payment track records of different client types.
- Job health analysed by account manager.

It's usually the total lack of awareness of these patterns that gives them their power. Kent Valentine, Director of Draw, told us:

"Getting Synergist gave us a surprise benefit: it shows us new ways to look at our data, uncovering trends, patterns and opportunities we had no visibility of before."



Kent Valentine, Draw

DRIVING THE CONSULTANCY

B. CONNECTING IT ALL TOGETHER

When we ask our users to summarise what Synergist does for them, the most common response is that it pulls everything together.

Martyn Dyer, Financial Manager of a project-based business, told us:

“Before Synergist, Creative Jar used several different systems. None of their elements talked to each other. It was at this point that we started to grow, and it became clear that complete visibility was needed. We needed far greater capture of everything that is going on.”

“Therefore our vision became clearer: we needed to focus on key performance indicators, which relies on everything being connected, everything in one place”

Alexandros Iakovidis, Managing Director of consultancy Europe Economics, spoke of how they manage their consultancy:

“Many skill sets, complex strands of data, projects, clients, time, and deadlines – all are pulled together into one system where everything is controlled in real time.”

“There are all sorts of ways you can try to pull information together, but finding a comprehensive solution that works properly for you is not so easy. But when you do find the right one, there are huge benefits to be had, for your consultancy and your team and your clients too.”

“Certainly Synergist delivers for us.”



Money Market Funds

Impact Assessment of Substantive EP Amendments

Report by
Europe Economics
for the European
Parliament

Julie Cole, financial controller of environmental consultancy EDP, emphasised the speed at which the big picture is brought into view:

“Perhaps the single biggest benefit of all is the instant way we now get the overview of all the projects summarised together at any one time, showing values and work in progress.”

Liam Herbert, then Managing Director of JBP, talked of the implications for control:

“Since installation we have been able to pull together consistently accurate information for job reporting, which has resulted in far better control of both our time and resources.”

Steven Hunt of consultancy Steven Hunt & Associates told us:

“It’s all joined up now. It was fragmented before, and it took a long time to gather and compare and process that information. It’s all in one place now, in front of you.”



Client work by
Steven A Hunt &
Associates

And Deep Sangar, Production Manager of Birmingham project-based company, told us of the immediacy of it all:

“Synergist pulls everything together... Jobs, estimating, scheduling, purchase orders, quotations.”

“It tells me immediately about the state of every job, the requisitions, the time remaining, the time quoted, everything.”

DRIVING THE CONSULTANCY

C. LIVE VISIBILITY

Is there a single word that summarises what Synergist delivers? For these business managers the answer is **Visibility**.

Steve Laird, Finance Director of consultancy Online design & Engineering Ltd, told us:

“The best thing about Synergist is the visibility it brings. It shows where the costs are, where the profits are on individual projects, and where the losses are – all giving you time to do something about it.

“It gives us great visibility of our clients, projects, estimating, everything.

“Synergist gives us the visibility of projects that we need. It gives us efficiencies. It reduces costs on jobs. And it gives us control. In a one-word summary, I would say it delivers Visibility.”

Steven Clark, Financial and Commercial Manager of Tayburn, said:

“With Synergist I know what’s going on in every job, and the great thing about it is that I know it as its happening. And the W.I.P. is so good. Most design agencies don’t have a clue about where they are on time spent and costs incurred to a job. They have a huge amount of money tied up and they don’t know exactly where, until it’s too late.”

Martyn Dyer, Financial Manager of a project-based business, recalls how life used to be:

“Before Synergist, Creative Jar used several different systems. None of their elements talked to each other. We have much better visibility of our future revenues now.”

Steve Lawrence, Operations Director at LHM, said:

“It’s great to have complete visibility of every job, who’s worked on it, what the estimate was, what the actual costs are, everything. You’re then able to generate a report immediately.”

Ashley Bliss, Financial Managing Partner at another project-based firm, told us:

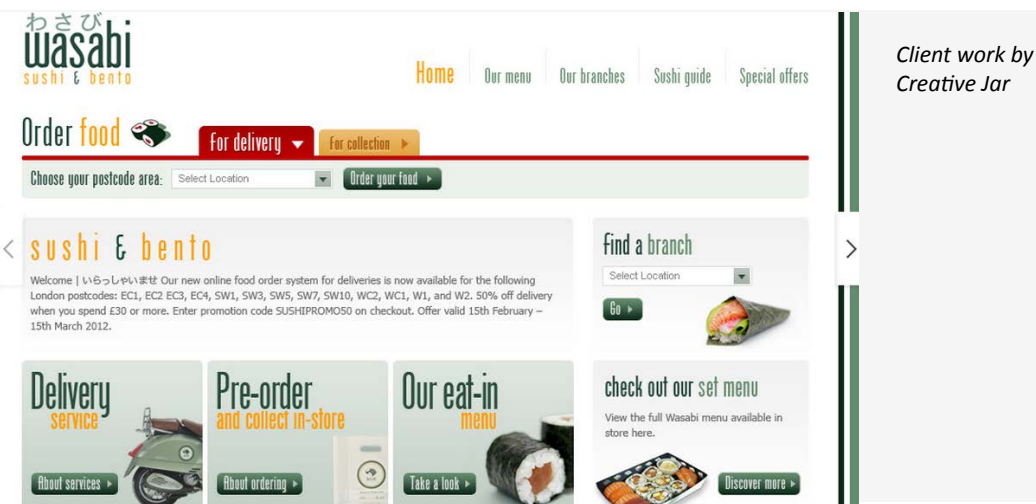
“We can easily see where jobs are in terms of budget using the innovative traffic light system”

Debra Seddon, Finance Manager at consultancy Steve Hunt & Associates, explained:

“For me, let me just add that if someone forgets to record some time to a job, it shows up now and doesn’t get forgotten. It’s a loose end that stands out, so it gets fixed. You capture the leaks that way.”

Steve Hunt added:

“Before Synergist, one project was subsidising another. The good jobs pay for the bad jobs. But we didn’t know which was which. Now it’s clear, and everybody here can see when their own project is healthy and when it isn’t.”



DRIVING THE CONSULTANCY

D. REDUCING BAD SURPRISES

How on earth can you avoid bad surprises if you have no idea where they might be?

In the MIT Sloan Management Review of Spring 2015 they discuss [unwelcome surprises in project management](#).



“Why do so many projects fail to meet their goals for time, cost and performance? Regardless of the answer, many project managers and their executive sponsors seem to be surprised when a new project gets off track: ‘Why didn’t we see that coming?’

“Even projects that employ sophisticated techniques for risk management can encounter surprising derailments. Those methods, while powerful, can only manage known risks. But projects are new and unique. What about the things that we don’t even know that we don’t know? These “unknown unknowns” — often called “unk-unks” — are lurking in every project, just waiting to emerge, surprise and derail plans.”

Steven Clark, Financial and Commercial Manager of Tayburn, gave us an example:

“Clients subtly ask for amendments here and there, which used to get



Client work by Tayburn

noded through for free. But the extra work really mounts up. Our [previous] system didn’t make it easy to track those changes, causing big problems.

“With Synergist I know what’s going on in every job, and the great thing about it is that I know it as its happening. Costs are captured real-time. So there are no surprises.”

Steve Lawrence, Operations Director at LHM, talks about the power of receiving early warnings:

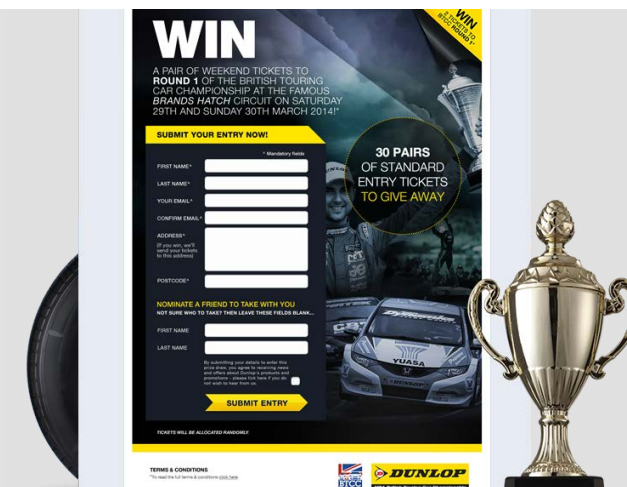
“With Synergist, we can spot issues early. We use the key reports a great deal. It’s essential in decision-making. We use Synergist’s report alerts. For example, when estimated costs logged to a job reach 50% we see whether we are half way through completing the job.

“It flags up problems early. So when we get to 100% there aren’t any surprises.”

Ans Ashley Bliss, Financial Managing Partner at another project-based company, told us:

“This has enabled us to act quickly where jobs are going outside pre-agreed parameters and make suitable adjustments to keep projects on track.

“This is great for our clients as it enables us to keep them fully informed as work progresses, with no nasty surprises.”



Client work by LHM

DRIVING THE CONSULTANCY

E. MAXIMISING THE RESOURCES YOU HAVE

Joe Schmidt, head coach of the Irish rugby team, has brought unprecedented success to the province, reaching 6 finals and winning 4 trophies during his 3-year reign. He became an Irish Citizen in 2015.



Schmidt is known for analysing opposition closely to expose pressure points, for short, sharp training sessions, and for simple game strategies based on pressure, territory, intelligent defence with aggressive line speed, and rehearsed attacking plays. How can his success be explained? In the book *Six Nations, Two Stories* he says:

"I wouldn't even say I have a rugby philosophy. I just think that you try to maximise the resources you have currently available and the combinations that they form."

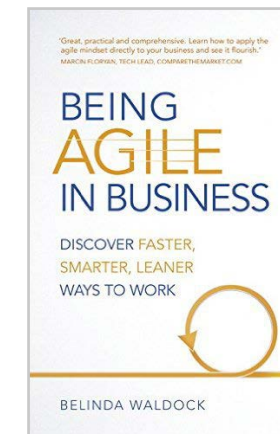
It seems obvious when you see it put like that. Don't fret about things you don't have. You might be planning to grow your agency, but before you get too carried away with hiring plans it makes sense to truly capitalise on what's available to you right now so you know your core capabilities.

When we met up with Gareth Moore, Chief Operating Officer at a project-based company, he talked about their previous way of growing their business:

"Synergist has streamlined our processes. Before, if we wanted to grow we would invest in extra people and hope that the turnover would increase by the percentage we needed."

"It's all completely different now. Today, we're much better at seeing exactly what we can achieve from the resources we have."

It's a concept that is much talked about in business today. The business books section of Amazon is full of such works. The June 2015 book *Being Agile in Business* by Belinda Waldoock is a good example.

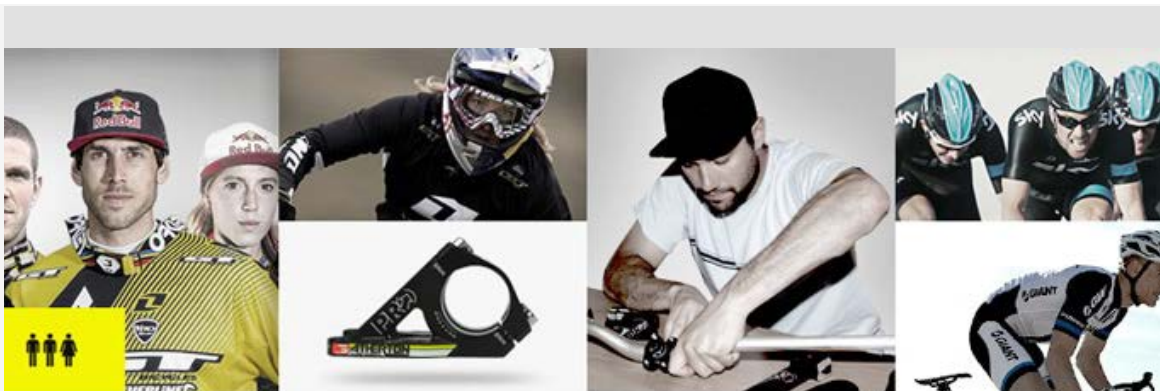


The author says that *"agile and lean aren't just business buzzwords – they're the fast and efficient methodologies you need to change the way you work."*

"Work faster, think clearer and improve your agility, both professionally and personally, with a suite of powerful tools that will introduce you to the essential skills and mindsets of agile and lean and quickly encourage you to start thinking differently. Be efficient: spot opportunities, maximise your resources."

Even allowing for the business guru hype, there's good sense in the concept of maximising what's you've got. Legendary tennis player Arthur Ashe, the ex-World No. 1 tennis player who won three Grand Slam titles, once said:

"Start where you are. Use what you have. Do what you can."



Client work by
Creative Jar

DRIVING THE CONSULTANCY

F. GENERATING REPORTS EASILY & QUICKLY

REPORTS are your window on your business. But some business managers remember how long it used to take to see through that window. Steven Clark, Financial and Commercial Manager of Tayburn, told us:

“Everything took so long to do. It used to take me two weeks to do the month-end every month. It was laborious to do the billing, the accounting entries, create the reports and have many, many meetings to chase the information we needed.”

“Synergist makes it so much easier. My month end has been cut in half to 5 days, to get the billing sorted, check the accounting links, generate the reports and meet up with team members to talk things through.”

Ashley Bliss, Financial Managing Partner at a project-based business, also recalls wrestling with their pre-Synergist system:

“One of our biggest challenges was its limited ability to produce user-friendly, instant, repeatable reports on enquiry.”

Rob Hill, Managing Director at HMA, talks of the automation aspect of reporting:

“Synergist plays a significant role in helping agencies drive through efficiencies. For example, it has helped us to automate reporting. Before Synergist we used to spend hours and hours on producing reports.”

“It means that all the reports are available to everyone, so if ever the Synergist SuperUser is not in the office they all still have access to it.”

Mark Beaumont, Founder of a Manchester project-based business, talks of how just a couple of essential reports make all the difference:

“As long as I keep on top of Work in Progress and Forecasting – two essentials even in good times – I feel I can run it with only a sideways glance at the other key reports because I can see from those two essentials that the team are on top of them all and it’s humming along.”

Steve Lawrence, Operations Director at LHM also talks about their key reports:

“With Synergist we understand the metrics of every part of the company

and track the processes and the finances. With it, we can spot issues early. We use the key reports a great deal. It’s essential in decision-making.”

Deep Sangar, Production Manager at another time-based firm, said:

“At the end of every day I generate a report that shows all the key information, which I use to email the account managers with updates, slippages, etc.”

Nigel Wilson, their Managing Director, added:

“We no longer have to rely on gut instinct and experience alone. It’s there in black & white. Synergist gives me the reports I need.”

Liam Herbert, then Managing Director of JBP relates reporting to planning:

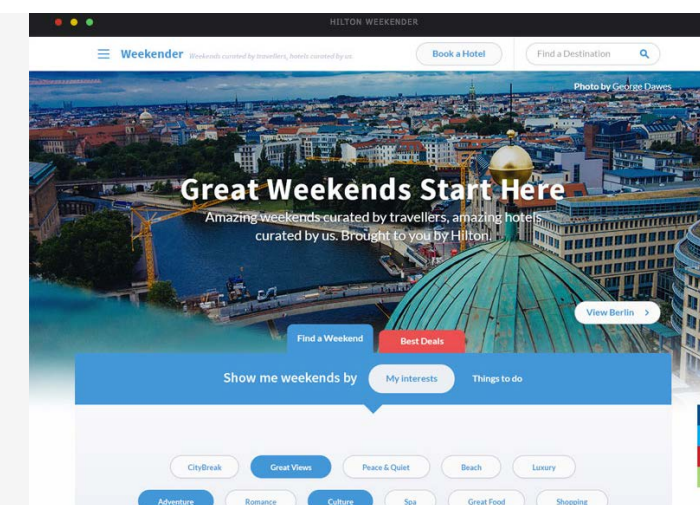
“Since installation we have been able to pull together consistently accurate information for job reporting, which has resulted in far better control of both our time and resources. We have found that management reports and invoicing are far more consistent and simpler to generate at month end, enabling more effective planning and resource management.”

And Sukhi Dehal, Managing Director at 383, equates the reports with the return on their Synergist investment:

“We have found that since using Synergist we have been able to plan more accurately around capacity and produce very accurate automated financial reports that are delivered to our inbox from the system.”

“Synergist is proving to be very impressive with the quality and detail of the reports now that we have a large volume of data. All indications are that the system will probably pay for itself in just three or four months!”

“I would certainly recommend Synergist to any agency looking for a system to provide accurate reporting, ease of use for staff to log time and compatibility with accounting software.”



Client work by 383 for Hilton

DRIVING THE CONSULTANCY

G. FIXING ISSUES EARLY

Before implementing Synergist, Purestone developed a spreadsheet-based job tracking system. It worked OK but it caused them various problems.

- it didn't give the granularity they needed
- it couldn't show which jobs were profitable
- the data was after the event, so they couldn't act to fix things in time.

So, being able to fix things while there is still time to do something about it was a key requirement for them when they implemented Synergist a couple of years ago. Says Simon Butler, Purestone's co-founder:

"We now have two years of clean, valuable data to draw from.

"Recently we hired a highly-paid contractor to do work that our data said should take three quarters of a day. He was actually taking two days. With Synergist this stands out. We can act before it's too late. We now see issues sooner and have the facts to back up the intuition."

'Fixing issues early' can therefore be about using the intelligence accumulated in your system about your past jobs.

Deep Sangar, Production Manager at a project-based company, told us that it also refers to early warnings:

"Synergist pulls everything together... Jobs, estimating, scheduling,

purchase orders, quotations. It tells me immediately about the state of every job, the requisitions, the time remaining, the time quoted, everything. It flags up problems early on."

He told us of his daily routines:

"At the end of every day I generate a report that shows all the key information, which I use to email the account managers with updates, slippages, etc."

"At a quick glance I can see everything. It makes it easier than ever for me to work with the account managers and work out what we need to do to keep on track."

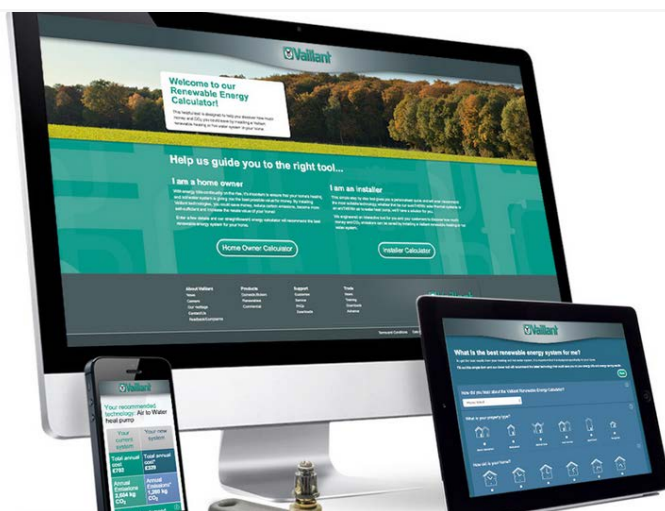
Synergist can be set to automatically trigger alerts on specific conditions that you choose.

Some example alerts include:

- When costs have reached X% of the estimated budget on job
- Overdue timesheets
- Late jobs, phases or tasks
- Costs being added to final-invoiced jobs



Deep Sangar



Client work by
CleverCherry

DRIVING THE CONSULTANCY

H. ENRICHING YOUR FUTURE COMPANY DECISIONS

It's well documented that implementing a Synergist system makes for better-informed decision-making across the company.

The empowerment that individuals gain with improved visibility of information results in better-informed decisions taking place all day long, right across the business.

But Synergist also greatly affects the decisions of those running the business itself. Gareth Moore, Chief Operating Officer at a project-related business, told us of its strategic position:

"In creating our future, all the decisions of how to get there will come from Synergist."

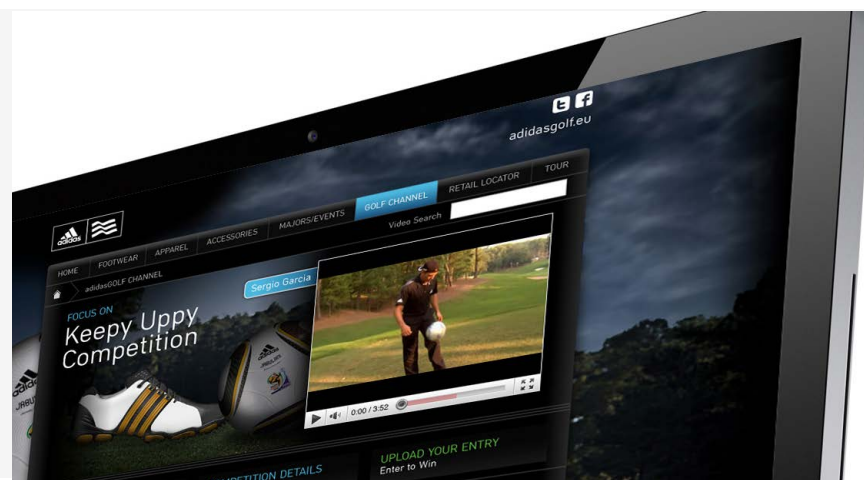
Mark Beaumont, founder of a Manchester company that tracks their projects and hours, said to us:

"We're sorted now and for the future, and I can see that I could run a 200-person agency with Synergist. That's very reassuring."

"Knowing you have a system that can handle it all and pull it all together and grow with you is a good feeling. Getting Synergist was a smart move. I will retire with Synergist!"

The metaphor of Synergist as the backbone of a company has been mentioned more than once by users. Simon Butler, co-founder of Purestone, told us:

"As a digital agency we always tell our clients that their website is the backbone to their business. Well, Synergist is the backbone to our business."



Client work by
Purestone

And Joseph Richardson, CEO of another project-based company, said:

"Synergist is the fantastic backbone of our company."

Reflecting on his Synergist implementation, Ian Hughes of LHM talked said:

"The biggest buzz for me? To be able to drive a company to success, make well-informed decisions every day, come up with innovations that create new opportunities for us, see client solutions and creativity working well, and watch our team becoming more empowered and working smarter all the time".

Finally, Steve Collins, the Finance Director of Amaze, said this:

"Synergist sits at the centre of everything we do, operationally and financially."

"Synergist has provided the backbone/infrastructure to assist with the changes in business process which were implemented to help focus the business in the right areas and make the stepped changes we have taken over the past 8 years."

"Synergist provides one version of the truth, which enables the business to make informed decisions and accordingly make continual changes and improvements."

"It provides the link between day-to-day operational information and key metrics which underpin financial performance, which enables business managers to react or plan more efficiently to achieve desired goals."

"It enables us to keep our fingers on the pulse of the business week to week, tracking both business done and future business".



Joseph Richardson

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Implementation and consultation by



www.magnifeye.co.uk
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