



Resource Partners With A Top Resource “TOP Step Consulting” For Improving Business Operations

Background

Most companies begin at root level and work their way up the tree of success. Thirty years ago, Resource bore fruit quickly at the top branch, when they plucked Apple Computer as their first client. They distributed their web-savvy seeds of success to a host of Fortune 500 companies by creating innovative consumer experiences to keep them more fruitful than the rest.

They primed Sherwin Williams; smoothed Gillette; bolstered Victoria’s Secret; detangled Herbal Essence; fanned the fragrance of Gain; plugged in Hewlett-Packard and put a new purr in Purina. They were so successful; they went from a staff of 50 to 320, and from working on one project at a time to hundreds at a time. As might be expected there were growing pains along with this success. They were so focused helping other companies create their innovative digital marketing strategies that they neglected to see the impact this success had on their existing systems that supported their business operations.

The Problem

In 2011 their new chief financial officer, Rick Smith, appraised the situation and was surprised at what he discovered. “How can we run a company as big as we are on spreadsheets?” Reality was, like many other companies who have grown and evolved, Resource had many different systems that supported their operations, including spreadsheets, homegrown systems, and commercial systems - none of which were integrated or shared information. Quickly, a decision was made to make a change and RFP’s went flying. Executive directors from technology and operations were tasked with finding and implementing a system that would support how they managed their operations, and could help facilitate and improve delivery of services to their customers. Four high level goals became the focal point: A unified system for project, resource, and time management; real time financial visibility; templates for project work; ease of time and expense entry. This was no easy task. Executive director of operations, Drew Sheppard explains how Resource needed a top resource to guide their efforts.

The Need

- A unified system for project, resource, and time management
- Real-time financial visibility
- Templates for project work
- Ease of time and expense entry
- Expertise to help guide their efforts



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The Solution

“We called in TOP Step Consulting,” says Sheppard. “I remember our team had just spent a few days visiting like-minded companies, which had already gone through what we were experiencing, and they asked how we were planning to implement the Professional Services Automation system and if we were considering to use an outside company like TOP Step Consulting to provide assistance. It was the first time we had heard TOP Step Consulting’s name. And now, looking back it seems funny, but even if there were other companies *like* TOP Step, we wouldn’t choose anyone *but* TOP Step.”

As Sheppard and his core team set a launch date six-months out, the TOP Step team went to work studying Resource’s business model. Understanding it was imperative. Deciphering it was almost impossible.

“We told TOP Step, anytime you think we’re nuts, just say so,” says Sheppard with a smile. “Well, they didn’t hesitate to tell us, but TOP Step also didn’t flinch and kept on working to sort it all out. We came up with a playbook of how things work here that any end user could utilize. It helped us to know if what we wanted to do was going to work or if we needed to make changes. The TOP Step team minimized the amount of changes we needed to make. They often said at different junctures, being very honest with us, ‘What you want to do here isn’t necessarily the best way to do it, but we’ll make it work for you.’ The TOP Step team took the time to understand our business, and because we always try to live in our client’s shoes, it was such a relief to find a company that would do the same for us.” Sheppard estimates that had TOP Step not been involved, Resource would not have hit our aggressive launch date for the new PSA system. Or, at the very least have only been 70% up and running.

“We couldn’t go live partially,” says Sheppard. “It was all or nothing. We locked the door behind us and said we can come out when we’re done. TOP Step locked themselves inside with us and became a critical part of our team. They worked to find solutions for using our new PSA system, NetSuite OpenAir, which we would not have found if we had attempted to do this without them. They have a very honest, unbiased focus on how they work with a client, and because they came in at the beginning of our journey, it helped them to know how to guide us.”

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TOP Step’s guidance didn’t end when the switch was turned on and the spreadsheets replaced. The team was tasked with enabling immediate productivity with the new system. They provided a three-pronged training approach for Resource’s PM/Ops personnel, creative/technical/strategic staff, and financial staff – who were still preparing financials based upon the previous year’s spreadsheet data. Each training session was unique to the staff’s needs. Since the TOP Step team knew how the company functioned, they could demonstrate the new tools, show how they worked on each level, and teach the differing groups how to tailor the system to specific needs.

The Results

The results were immediate. One of the benefits from a successful system adoption was real-time visibility. This allows Resource to improve their responsiveness to the needs of their clients and provide the ultimate customer experience - not just on what they create and implement, but for all the supporting activities and transactions on financial and administrative levels.

“We are effectively handling 300 projects at a time now,” says Sheppard. “Some are handled by a few people for a small number of hours and some are by large teams for many months. We have some who are retained to work on a project and others who contribute that are not retained. It’s our way of doing business and it works for us, but now we can track everything quickly and efficiently. It’s a crazy business sometimes, but it’s our crazy business and we like it. With TOP Step’s help, this changeover was a culmination of an interactive effort to make all of the new system’s resources available to our staff. TOP Step’s expertise in guiding us through this journey and helping us avoid mistakes that would have set us behind, was one that was appreciated by our entire team at Resource, and well worth the investment.”

What Was Delivered

- A unified system for project, resource, and time management
- Real-time financial visibility
- Templates for project work
- Ease of time and expense entry
- On-time launch of the new system
- Successful user adoption of the new system

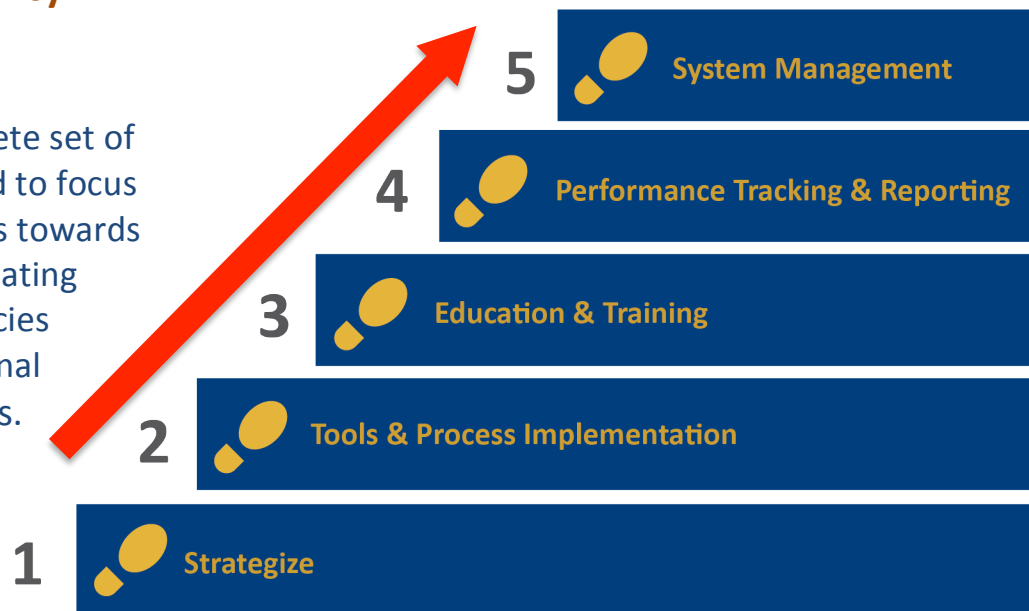


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STEPS to Professional Services Efficiency

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About TOP Step Consulting, LLC

TOP Step Consulting improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business. Our experts have extensive experience in professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research for a fourth consecutive year.

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