Improving Resource Coordination For iModules

Background

iModules is a leading solution provider in online Constituent Engagement Management for educational institutions. Its interconnected suite of modules transforms how institutions create relevant constituent experiences and achieve fundraising success through web content management, marketing communications, online giving, event management, e-commerce, and social media integration. Their expertise and exceptional customer service combined with a passion for web technology deliver meaningful results in marketing communications, giving, memberships and stewardship for educational institutions. With more than 800 clients reaching more than 107 million constituents, iModules has been an industry leader since 2002 by partnering with educational institutions worldwide to achieve their missions.

Business Challenge

iModules implemented NetSuite OpenAir late in 2014. Although they understood the benefits of using a Professional Services Automation system, they quickly realized that they had not initially configured the system that best matched their specific business model. iModules had installed and configured a system with minimum functionality, which led to frustration and low adoption of the system. One of iModules primary needs was to improve resource coordination, including the ability to forecast resources and report on resource utilization.

> *"We were wasting valuable time through trial and error."*

Solution

iModules met TOP Step Consulting during the SuiteWorld conference and were pleased to discover that guidance and expertise were available to help iModules configure NetSuite OpenAir to meet their particular business needs. A decision was quickly made to bring in TOP Step Consulting to conduct a Business Efficiency Assessment. During the two-day workshop, iModules and TOP Step Consulting worked through the challenges iModules faced: workflow, roles and responsibilities of individuals within each department with the system, and understanding data and information needs. Once this first critical step was completed, iModules and TOP Step then reviewed the NetSuite OpenAir configuration to determine where the gaps existed. Out of this, TOP Step documented actions and recommendations for configuring the OpenAir system, including functionality changes, reporting adjustments, and staff training needs. Lastly, iModules prioritized the actions, and TOP Step laid out a plan for implementation to ensure adoption and achievement of iModules goals.

"The knowledge TOP Step Consulting shared saved not only time but helped us overcome our challenges with resource coordination and adoption of our OpenAir system."

Results

"The improvements we have made in our OpenAir system are amazing," said Amy Horton, PMO Manager of iModules. "The Business Efficiency Assessment greatly helped us realize the true benefits of the OpenAir system. During our time together, TOP Step Consulting trained and educated us. The recommendations they provided were specific to our needs – not general function and feature discussions. The knowledge we gained has been a catalyst to help us reach our goals."

Prior to working with TOP Step Consulting, iModules had a generic system not aligned to their business model.

- Removed manual updates by Project Managers of custom project date fields to pass back to the database of record, NetSuite; i.e. projected prototype date, projected launch date, and actual launch date.
- Real-time visibility, enabling improved resource coordination
- Empowered with knowledge that allows us realize the benefits of an integrated PSA system

"Before TOP Step Consulting, we were wasting valuable time through trial and error. The knowledge they shared with us saved us not only time but has helped us overcome the challenges we had with resource coordination and adoption of our OpenAir system, " said Horton.

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 sixth consecutive year and listed as a 2015 INC 5000 company.

TOP Step Consulting, LLC
43627 Oleary Lane
South Riding, VA 20152

Ph: 703.957.8370
Email: info@TOPStepConsulting.com

Connect with us!

TOPStepConsulting.com
twitter/TOPStepTweets
linkedin.com/company/top-step-consulting-llc
fb.com/TOPStepConsulting