Mulberry Consulting, International Business Specializing in Customer Experience Consultancy Uses Tenrox Cloud PSA

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MULBERRY CONSULTING

Market background

London-based Mulberry Consultants advises large international clients on managing customer relationships. Using a variety of techniques and tools including Customer Journey Mapping, the firm improves the quality of those relationships all the way from prospects to account termination.

Challenge

Even with a global client list that includes large publishing companies and financial institutions, Mulberry relied on spreadsheets and manual data entry and processing to track associates' activity and project status. Individual hours were compiled in a master spreadsheet and then compared against an additional set of data to determine actual versus forecast hours and realized project revenue.

It was a time-consuming and error-prone process that required two full man-days per week. Duncan Wilkie, management information systems manager, characterized it as "quite confusing."

Developing project status and reports were equally cumbersome. "As timesheets were submitted, we would manually update the forecast numbers to the actual numbers. So it wasn't until a project was completed that we could really determine if it was over or under what had been forecast. And if we needed historical data along the way, that meant searching through another series of spreadsheets to find the requested details," Wilkie explained.

"The ability to generate real time reports with Tenrox has made a real and meaningful change to our culture. The access to information is much richer than we have ever had—and that leads to better visibility, better management and the ability to be more responsive to our clients."

— **Duncan Wilkie, Management Information Systems Manager**

INDUSTRY:	Professional Services
REGION:	London, New York, Toronto
WEBSITE:	mulberryconsulting.com

At a Glance

Challenges

- Manual spreadsheets
- Time-consuming and error-prone processes
- Inability to forecast the health of a project till it was completed

Benefits

- Flexibility to adapt to the way their business operates
- Reduced administrative staff time by more than 50%
- Cloud-based
- Intuitive interface
- Associate project invoicing has been streamlined

Tenrox
by upland

The Tenrox by Upland Solution

Mulberry knew that it needed a more efficient and more accurate system in place to keep pace with growth and client requirements. When it made the decision to begin investigating available options, the flexibility to set up assignments on a project-by-project basis was determined to be a key capability.

"There are many systems that can record time and cost details, but Tenrox is flexible enough to accommodate to the way we operate. Each project is a stand-alone piece of business—and even then the requirements and activities change as the project progresses. With Tenrox, that isn't a problem," Wilkie said.

As a result, the firm chose Tenrox cloudbased professional services automation (Tenrox Cloud PSA). The cloud-based platform allows Mulberry to devote all of its attention to its core business activities by relying on the technical support and expertise provided by Tenrox.

Benefits

"Tenrox Cloud PSA interface is so intuitive that our users found it easier to use than traditional spreadsheets," Wilkie stated.

Tenrox Cloud PSA provided a number of key improvements and benefits to Mulberry's operations. To begin with, the interface is so intuitive that users have found it easier to use than traditional spreadsheets. That is partly due to the fact that the system's rules and automation show each individual user only those projects and activities that are currently active for them. This eliminates misallocated or incorrectly entered hours.

Manual processing of hours and project status have also been eliminated. This has reduced required administrative staff time by more than 50%.

Tenrox Cloud PSA automation has also streamlined associate project invoicing. Instead of staff submitting invoices, the system generates a monthly statement that is sent to the employee to review and approve. Because the results are based on data they have already entered, there are no disagreements or surprises, according to Wilkie. The process also gives the firm access to invoice and budget data in real time.

Lastly, Tenrox has given Mulberry the ability to produce ad hoc reports at a moment's notice. When a project manager requests status information, a response is available in minutes, as opposed to the hours that used to be needed to search through numerous spreadsheets.

About Tenrox

Upland's Tenrox is a cloud-based professional services automation software application that automates project initiation, resource management, time and expense, and reporting and analytics to improve the management of billable projects from pipeline to close. Tenrox offers configurable cost and billing rules, including chargeback or invoicing, with certified integrations to all major CRM and accounting systems.

About Upland

Upland Software provides Cloud Solutions across the enterprise enabling amazing customer outcomes in:

+ PROJECT & IT MANAGEMENT
+ WORKFLOW AUTOMATION
+ DIGITAL ENGAGEMENT

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