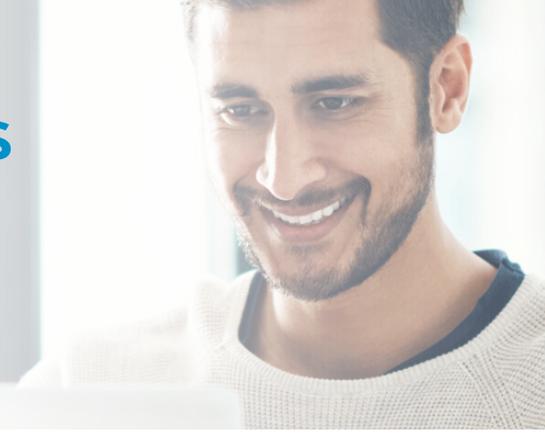


Shift Technologies improves administrative efficiency by 96% in key areas



Automating their business with Tenrox PSA enabled Shift Technologies to increase their efficiency by facilitating invoicing, revenue recognition, tracking and collection processes.

Challenge

The arrival of a new CEO, with a mandate to streamline performance, started the search for a PSA solution.

The main consideration for Shift Technologies was a high level of flexibility. They needed a solution that could take into account the fact that they bill fixed prices for projects, but measure profitability according to time spent. They needed to match their group financial system's structure and interface smoothly with their ERP, but meet their own requirements for administrative efficiency and project and performance analysis. They needed to manage differences between countries, [such as currencies], and even unknowns, [such as currency fluctuations or taxes], but be guided by sufficient structure to avoid being overwhelmed by all the possibilities.

Additionally, with a workforce constantly on the road, they needed a solution accessible from anywhere, to ensure the picture they had of their performance at any given time would be up to date.

To obtain as much flexibility as possible, their previous solution had been a hybrid of functions from multiple solutions. It did not enable them to appropriately and accurately measure time spent by consultants against projects and, therefore, manage projects cost-effectively against budget. While it integrated with their ERP and conformed to group financial requirements, it did not give them a centralized view of project data and resource utilization, which meant they could not assess performance and plan for staff availability. And it did not manage multiple countries at once, making for a complex accounting process.

“Tenrox is a valuable asset for us. We use it on a daily basis; we'd be lost without it.”

– Yousef Al Barkawie, CEO, Shift Technologies



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AWR ROSTAMANI

Shift Technologies

Shift Technologies delivers digital transformation for a broad range of clients, strategizing, architecting and integrating solutions based on cutting-edge technologies. As part of the AW Rostamani Group of companies, they must report to shareholders and, therefore, comply with group finance requirements.

Challenges

- Accurate measurement of project cost performance with multiple revenue recognition
- Ability to efficiently analyze performance through a centralized view of all project related information
- Visibility over resource requirements and allocation
- Ability to meet group financial reporting requirements and manage multiple locations

Benefits

- 96% increase in administrative efficiency
- Heightened productivity in invoicing and revenue recognition
- Error free expense reimbursement
- Accelerated time and expense claim processing, from days to minutes

The Tenrox by Upland Solution

Since 2014, Shift Technologies have been using Tenrox for a streamlined solution that has had a marked improvement on their efficiency.

Tenrox Project Management gives the company's executives a centralized view from bid to bill, to efficiently plan and track every stage of the delivery lifecycle, taking into account differing holidays in the countries they do business in and resource availability. Tenrox Time and Expense Automation updates the information in real time with data from Shift Technologies consultants via mobile app or cloud platform, smoothly managing multiple currencies and taxes, and allowing capture and approval according to Shift Technologies' specific parameters.

Tenrox Resource Management enables resource optimization according to customer needs and locations, and planning for upcoming projects. It feeds into Tenrox Project Billing and Financials for automatic invoicing, as well as tracking of their fixed price income against the total cost of the project.

Upland Analytics for Tenrox pulls data from all the modules, giving company management overall visibility over resource utilization and internal efficiency KPIs, as well as enabling customized reports and export files to their ERP for shareholder reporting compliance.

Benefits

Tenrox helps Shift Technologies generate insights they were never able to obtain before. In real time. Previously, the CEO had to wait a month for his performance analysis reports, now he can get them on demand during a cycle, or the day after the end of a cycle – an essential improvement for him.

"I can't run my business otherwise. If the most recent figures you have are 30 days old, you're running last month's business not today's," he specifies.

And there are more improvements: in efficiency and employee satisfaction. Timesheets and expense claims now take five minutes instead of two hours, and processing has gone from eight person-days to two person-hours per month. This means reimbursement of expenses has dropped from 30 days to two days, and can even be immediate, and the error rate has gone from 7% to zero, thanks to embedded checks and balances in the reporting and approval processes. "People have thanked me for making their lives easier," says the CEO.

For more information on Tenrox, visit: uplandsoftware.com/tenrox



About Upland Software

Upland Software [Nasdaq: UPLD] is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.