

AKA Enterprise Solutions Places Upland PSA at the Center of Its Service-Oriented Business



AKA Enterprise Solutions uses the Upland PSA professional services automation (PSA) solution from Upland Software to enhance the efficiency of key processes and deliver a superior customer service experience.



Looking to Expand Existing Professional Services Automation

AKA Enterprise Solutions is dedicated to helping clients transform their businesses by tapping into innovative technologies. At the center of this services organization are several vital, interconnected processes including time-and-expense tracking, resource management, project management and project billing. These are the processes that enable AKA to match the right people with the right projects and help ensure they are completed to the clients' satisfaction while being on time and on budget.

In 2013, a company that would later merge with AKA decided to replace the PSA solution it was using to manage some of these processes. "We had an aging tool for time-and-expense management and invoicing," says Alex Carlock, IT Manager at AKA. "It worked, but we needed a more modern, user-friendly solution that could simplify tasks. At the same time, we wanted to expand our use of PSA to include resource and project management, which we had been handling with spreadsheets. Our goal was to enhance internal efficiency so we could provide the highest level of customer service."

"We save dozens of people-hours every week for a total of nearly 1,600 hours per year in both our accounting and professional services departments."

- Benjamin A. Holtz, CFO, AKA Enterprise Solutions



For more than 25 years, AKA Enterprise Solutions has been dedicated to making it easier for organizations to do business by using technology to simplify processes and reduce risks. Specializing in Microsoft Dynamics 365, cloud services process consulting, and custom application development, AKA helps clients innovate their way to greatness.

INDUSTRY: Technology

REGION: Across the United States

WEBSITE: akaes.com

Challenge

Increase the efficiency of project delivery for the company's service-oriented business so employees can focus more on improving project outcomes and delivering a strong customer experience.

Solution

Implement the Upland PSA solution from Upland Software to automate and optimize key processes using modules for time-and-expense tracking, resource management, project management, and project financials.

Why Upland PSA

With Upland PSA, AKA gained end-to-end professional services automation capabilities through a single, cloud-based solution.

Results

- Improved the customer experience by accelerating assignments, enhancing project tracking, providing flexible billing options, and generating accurate, detailed invoices
- Simplified time-and-expense capture for employees
- Reduced administrative complexity saving nearly 1,600 hours per year

Selecting the Cloud-Based Upland PSA Solution—Twice

The IT group chose Upland PSA to replace its existing tool and spreadsheets. It implemented Upland PSA for an end-to-end solution that integrates time-and-expense management and billing with project and resource management. Information flows seamlessly among the different functional modules, providing a single source of truth.

A positive experience with Upland PSA led to its selection a second time a few years later. After the merger in 2016, the IT group at AKA decided to extend the Upland PSA deployment across the newly formed organization. Currently, more than 120 employees use Upland PSA every day.

“We saw an opportunity to consolidate tools for the merging companies,” says Carlock. “We evaluated multiple solutions, but Upland PSA was again the clear choice. Upland PSA offers a comprehensive set of capabilities that not only improves internal efficiency, but also helps us deliver a superior customer experience.”

Streamlining Internal Processes—Saving Nearly 1,600 Hours per Year

By simplifying administrative tasks, Upland PSA helps ensure they are completed in a timely manner. For example, Upland PSA removes obstacles for users to promptly enter their time and expenses. “Upland PSA has a modern, web-based portal and mobile app that makes it easy for users to log time and upload expense receipts,” says Carlock. “And because Upland PSA shows them only the projects assigned to them, they can avoid long searches for project names and codes.”

Upland PSA also streamlines key processes for managers, including choosing the right resources for projects, making assignments, tracking progress, approving expenses, and billing clients. “Our billing process is significantly faster and simpler than it used to be,” says Carlock. “Automation eliminates the need for time-consuming, manual invoicing. And because time-and-expense, approval, and billing capabilities are all integrated, we can be confident that invoices always contain accurate, up-to-date information.”

“We save dozens of people-hours every week due to the efficient time-and-expense entry for our end users,” says Benjamin A. Holtz, CFO at AKA. “We save another 10 to 12 hours of administrative time each week—for a total of nearly 1,600 hours per year—in both our accounting department for invoicing and our professional services department for project report.”

Delivering Excellent Customer Service

By enabling project managers to quickly select and assign the right resources, Upland PSA helps AKA kick off customer projects rapidly. Once a client engagement is up and running, real-time visibility into project status helps managers ensure teams are meeting deadlines

When it's time for billing, Upland PSA gives AKA the flexibility to accommodate a variety of client preferences. “We can support anything from weekly time-and-expense billing to milestone billing for fixed-price projects—all without adding complexity for our project managers,” says Carlock.

Overall, enhancing the efficiency of core processes helps support a stronger customer experience. According to Carlock, “Upland PSA helps us run an agile, efficient business and deliver the high level of service our clients have come to expect from us.”

Benefiting from Platinum Services

As an Upland Premier Success Plan Platinum customer, AKA accesses the highest level of support, training, report development assistance, and other services. “Upland PSA consulting has helped us enhance the solution—for example, by writing additional reports,” says Carlock. “Meanwhile, the support team is extremely responsive. Upland staff members stay with an issue until a solution is found.”

Sometimes the dialogue with Upland leads to new feature suggestions. “Upland definitely listens to customer feedback,” says Carlock. “Several of our enhancement requests have been implemented. That is something we really appreciate about our relationship with Upland.”



About Upland Software

Upland Software [Nasdaq: UPLD] is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do. To learn more, visit www.uplandsoftware.com.

**For more information on Upland PSA,
visit: uplandsoftware.com/psa**