

Vantage Partners improves efficiency by over 80% and drives employee engagement with Upland PSA

Vantage Partners needed to automate to overcome a single point of failure. Upland PSA has started a journey to data-driven management

The Challenge

To be able to properly fulfil her role of managing the multiple projects of her client, ensure accurate invoicing, and get earlier insight into the monthly budget, new Client and Data Administrator at Vantage Partners, Allie Bohr, had built a sophisticated tracking tool in spreadsheet software. Her multiple tabs, per project and overall, showed hours worked; hours billed; which resources were working on what projects and what aspects; who was available; and who wasn't, either because they were already on a project, or because they had time off. Multiple sub-tabs enabled reporting to stakeholders and, subsequently, analysis. To collect the input data, each week, 25 consultants sent her spreadsheet timesheets by email, which Allie manually entered into her main table, spending a full 60% of her time collating, chasing and invoicing.

Allie's impressive solution worked. It worked so well, she had become indispensable. No-one else knew the process, and there was no progress during her vacation. Even billing was put on pause, making the lead-up to her time off one of her most stressful periods, as she scrambled to prepare as much as possible ahead of time.

An automated solution to manage this client's business was clearly necessary. Allie needed to be able to efficiently manage and incorporate time, including leave accruals and requests, and to be able to track adjustments. However, as she and her colleague researched potential solutions, they soon realized there were benefits for the whole company. Their specification list added Salesforce integration, resource management, tracking and predictive analysis allowing for more diverse reporting, to the initial time management. Their aim was to leave room for growth.

"Upland PSA is a very flexible and scalable solution that not only meets our needs now, but will be continue to be valuable as we grow our business."

- Allie Bohr, Client and Data Administrator, Vantage Partners

"Upland PSA has given us an opportunity to optimize how we manage our resources, helping us hire and retain good people and ensure profitability."

- Vivian Wexler, Director of Talent Management, Vantage Partners

upland PSA



Headquartered in Boston, Vantage Partners serves clients worldwide, across multiple sectors including biopharmaceuticals, healthcare, energy, financial services, high-technology, and manufacturing. They provide consulting and training services covering the entire spectrum of management, advising and supporting clients in their strategizing, planning and executing.

INDUSTRY: Management Consulting

REGION: USA & Worldwide

WEBSITE: vantagepartners.com

At a Glance

Challenges

- **Automate management** of client projects and resource allocation
- **Efficiently** incorporate and manage time, including leave
- **Enable** reporting and analytics
- **Grow** the business

Benefits

- **83% efficiency gain** managing time
- **Increased visibility** for decision-makers and employees
- **Improved employee engagement** due to project KPIs and better resource allocation
- **in-depth analysis** enables planning for future improvement

Upland PSA – end-to-end flexibility

Vantage Partners eventually settled on Upland PSA – for its flexibility, its end-to-end offering which gives them unprecedented detail, its data migration service, and its potential to scale into something else.

Where other systems had fixed parameters, multiple conditions and contingencies, all requiring workarounds for adjustments, Upland PSA does not. Its fields and workflows can be configured to the precise requirements of your business. “We could make it do what we needed to, rather than us adapting to it,” said Allie Bohr. Additionally, Upland PSA has maximum flexibility to create, update and maintain those fields and workflows as your business evolves.

This was particularly appreciated in the roll-out across the entire company. While Allie’s key account requires a lot of depth of data, other clients are simpler to manage and the company has been able to keep the flexibility in processes they had before Upland PSA, but still get good data they can use.

The solution that met their needs for managing 200 projects annually comprised **Upland PSA Time and Expense**, which captures consultants’ hours easily and efficiently. A **customized report** extracts all the information they need, including billed and adjusted time. **Upland PSA Resource Management and Scheduling** enables the company to better allocate consultants to projects – taking into account their availability, but also ensuring they get the mix of work that benefits them – and to plan and budget both on a project level and company-wide. **Upland PSA Project Financials** helps them track and report on time and costs.

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



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.

Benefits – greater efficiency and data insights

Whereas Allie managed time data for 25 consultants a week previously, she now has responsibility across the company, for 55-60 people. But it takes her only 10% of her time. Invoices, which previously could only be raised a week after the end of the period, can now be issued in half that time. And that’s a total gain of 83%.

These radical improvements in efficiency are enabling her to devote more time to value-added work, developing company-wide reporting for all clients, and to provide better visibility for decision-makers within the company.

Upland PSA’s reporting capabilities are also being used by the newly hired Talent Development Manager, Lisa Connolly, to drive better employee engagement and work satisfaction. She is able to schedule resources better, according to their availability, and create a positive feedback loop by sharing project and client KPIs with consultants, improving their knowledge and ability to intervene.

Additionally, Vantage Partners has acquired a taste of what is possible. With Upland PSA, they can dive deeper into their existing processes and fix other goals for improvement, with the aim of being even more effective and efficient. Upland PSA’s integration with Salesforce, for example, will allow them to go beyond their current resource allocation capabilities to improve prediction and maneuvering.

“With Upland PSA, we can now measure planned versus action with much greater accuracy,”

“Over time, Upland PSA will help us understand exactly what is happening on the ground in our projects, as well as conversion rates and profitability.”

- Vivian Wexler,
Director of Talent Management,
Vantage Partners