

# AKA Enterprise Solutions Places Tenrox at the Center of Its Service-Oriented Business

AKA Enterprise Solutions uses the Tenrox 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."

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—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

**Location:** 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 Tenrox 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 Tenrox

With Tenrox, 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 Tenrox PSA Solution—Twice

The IT group chose Tenrox PSA to replace its existing tool and spreadsheets. It implemented Tenrox 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 Tenrox 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 Tenrox deployment across the newly formed organization. Currently, more than 120 employees use Tenrox every day.

“We saw an opportunity to consolidate tools for the merging companies,” says Carlock. “We evaluated multiple solutions, but Tenrox was again the clear choice. Tenrox 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, Tenrox helps ensure they are completed in a timely manner. For example, Tenrox removes obstacles for users to promptly enter their time and expenses. “Tenrox 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 Tenrox shows them only the projects assigned to them, they can avoid long searches for project names and codes.”

Tenrox 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, Tenrox 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, Tenrox 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, “Tenrox 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. “Tenrox 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.”

**For more information on Upland Tenrox, visit: [uplandsoftware.com/tenrox](https://uplandsoftware.com/tenrox)**



## About Upland

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.