

# Business Collaboration: Impact Your Business and Increase User Adoption

Presented by: Rick Childs



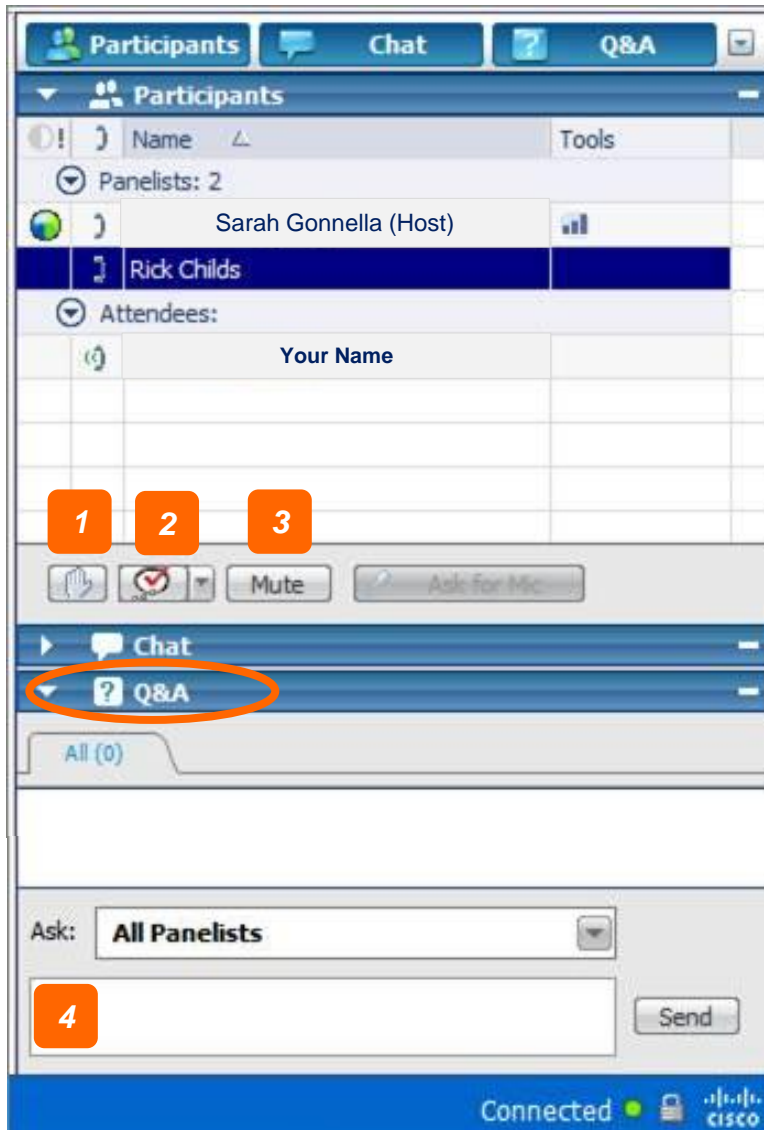
# Agenda

1. WebEx Instructions
2. Resources
3. Presentation
4. Questions
5. Contact Info

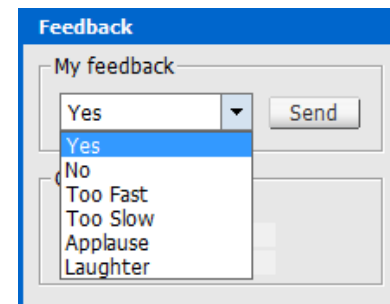
Keep your business  
on *course*.

Full Sail Partners





1. **Raise Hand** (be sure to click again to remove raised hand or feedback information)
2. **Feedback Tool** (use for yes/no questions or to provide the speaker feedback.)



3. **Mute** (mute yourself when you need to talk to someone in your office or put the line on hold)
4. **Q&A** (Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)



# Full Sail Partners Resources

## Benchmark Your Firm!

- Deltek 2014 Clarity AE Industry Study: <http://bit.ly/1ewcNxP>

## Events

- Kona Big Island Tour <http://bit.ly/Qjxeub>

## Webinar Archive!

- Growing Smarter! Core Growth Strategies for PS Firms: <http://bit.ly/16JePLy>
- SPI Research | Are Profits in Focus for 2014? <http://bit.ly/1hZHyPg>

## Articles

- Why Team Collaboration Tools are Essential for Productivity <http://bit.ly/1hxxOYY>
- Task Management Tools | Lessons Learned from Project Management <http://bit.ly/1iDNBL7>



# Business Collaboration: Impact Your Business and Increase User Adoption

Presented by: Rick Childs



# Story

What would you tell your friend?



# Story

Are you considering investing in an initiative at your firm within the next year?



# Story

Do you know the ROI?





# Agenda

- Change Management Study
- Defining User Adoption
- Key Areas Impacted by Change
- Increase User Adoption for 4 Hats
  - Areas of Focus
  - Roadblocks
- Case Stories
- Questions



# McKenzie Group Study

- 40 Companies over 10 years
- 143% ROI – Excellent Change Management Plan
- 35% ROI – Poor Change Management Plan

\*McKenzie Study | <http://gbr.pepperdine.edu/2010/08/the-business-impact-of-change-management/>



# McKenzie Group Study

*Equates to:*

**\$0.43 gain** for every dollar spent

vs.

**\$0.65 loss** for every dollar spent

\*McKenzie Study | <http://gbr.pepperdine.edu/2010/08/the-business-impact-of-change-management/>



# McKenzie Group Study

What type of change impacts success of an initiative?

\*McKenzie Study | <http://gbr.pepperdine.edu/2010/08/the-business-impact-of-change-management/>



# McKenzie Group Study

## User Adoption

\*McKenzie Study | <http://gbr.pepperdine.edu/2010/08/the-business-impact-of-change-management/>



# What is User Adoption?

- A metric?
- Training?
- Communication?
- Marketing?
- Leadership buy-in?
- Clear definition of success?
- Solving a business problem?
- Everyone adapting?



# What is User Adoption?

- Did the initiative accomplish what was established as success at the beginning of the project?
- Does the person that began the initiative and the people investing time and money see value?
- Is it impacting the company positively?

Don't forget: Did you see a ROI?



# Impact Change

What if we don't change?





# Impact Change

## Plan for:

- People
- Process
- Technology

## Impact on success:

- ✓ Critical
- ✓ Significant
- ✓ Important



# Impact Change

## People

- Do you have a champion?
- Do you have an executive supporting the project?
- Do you have each role across the firm represented?
- Do you have a plan on how to solicit feedback?
- Do you have a defined objective and goal?
- Does everyone understand and agree on the objectives and goals?
- Do you have people that will help govern compliance?
- Do you have a plan for opposition?



# Impact Change

## Process

- Do you have a plan for short-term and long-term needs?
- Do you have a go-to person for questions?
- Do you have a communication plan to explain changes and when training will be provided?
- Evaluate processes for efficiency toward achieving the objective and goal.
- Streamline the collection of suggestions and validate.
- Ensure flexibility and adaptability to changing needs.



# Impact Change

## Technology

- Define the objective of the technology solution
- Define the benefits in quantifiable terms
- Define metrics to measure success



# Impact Change

## Magnitude of Change Impacting Complexity

1. Impact to core competencies
2. Business significance of the change (critical?)
3. Lack of consensus of goal
4. Lack of participation by executive leadership
5. Compact or aggressive timeframe
6. Number of consultants or 3<sup>rd</sup> parties
7. Number of stakeholders
8. Number of individuals affected by change
9. Number of locations (more if in multiple countries)
10. Simultaneous changes to multiple divisions, processes, technology, skills, strategy
11. Degree of cross functional collaboration
12. Number of silos
13. Number of people not aware of change



# Four Hats Working Together



# Four Hats Working Together

## Four Hats:

- Executive
- Accounting
- Marketing & Business Development
- Project Managers

## Areas of Focus:

- Features
- Dashboard
- Reports



# Features for Four Hats





# Features for the Four Hats

- Mobile Access
- Standardize Dashboard Parts by Role
- Saved Favorite:
  - Reports
  - Lookups/Selections/Options
- Simplified/Flexible Viewing and Organizing of Data
- Access Info from Multiple Relational Data Centers
- Utilize workflows to:
  - Eliminate redundant tasks
  - Update other fields
  - Facilitate a process

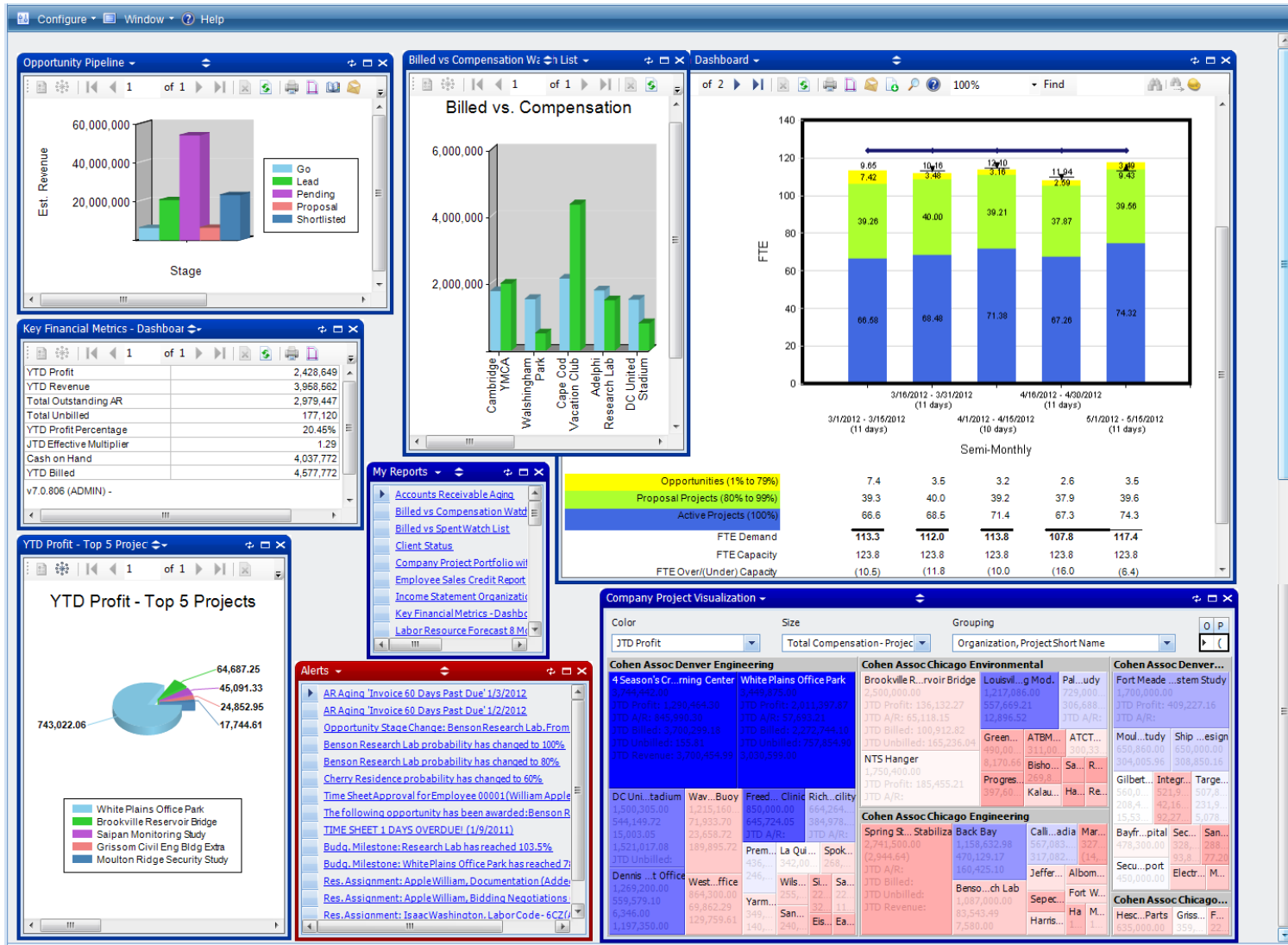
**What can you do to streamline your processes?**



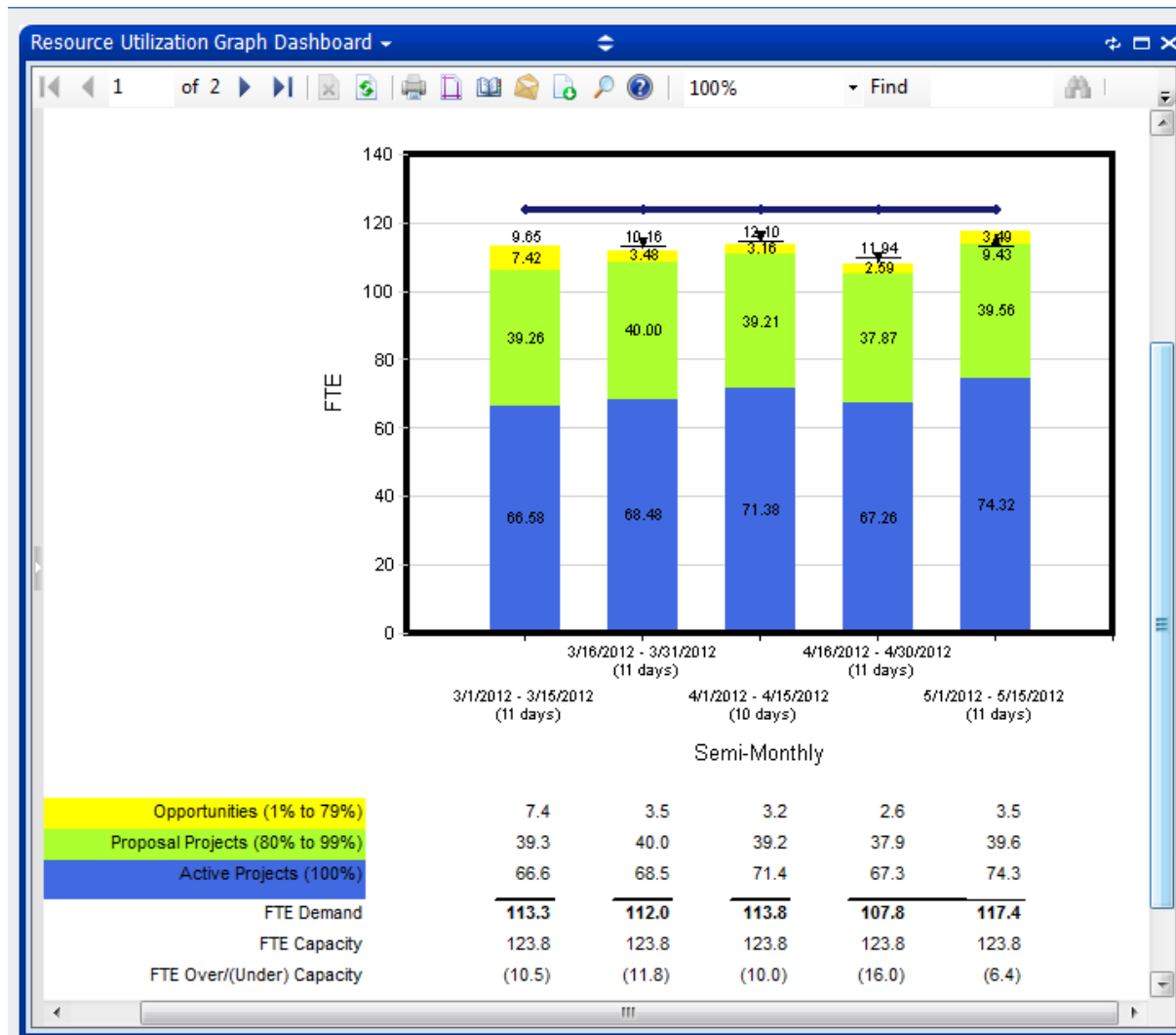
# Four Hats Dashboards



# Dashboard – Executive



# Dashboard – Executive



# Dashboard – Executive

## Executive Charts

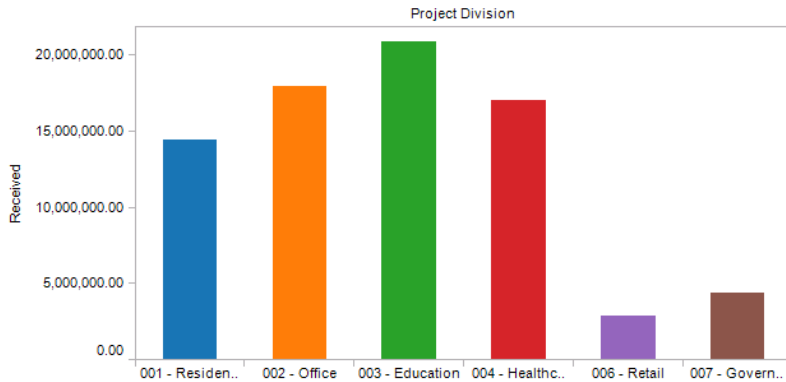
**Project Division**

- 001 - Residential
- 002 - Office
- 003 - Education
- 004 - Healthcare
- 006 - Retail

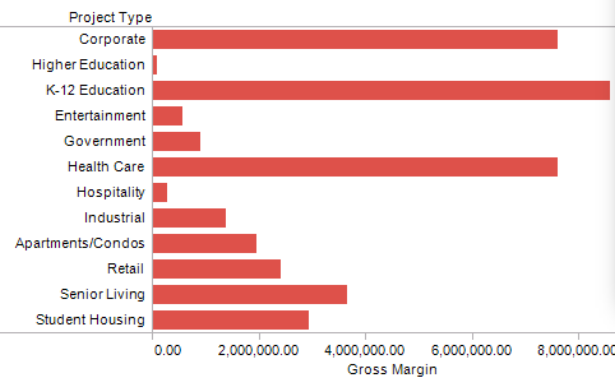
**Measure Names**

- Labor Total Cost
- Revenue
- Profit Percent

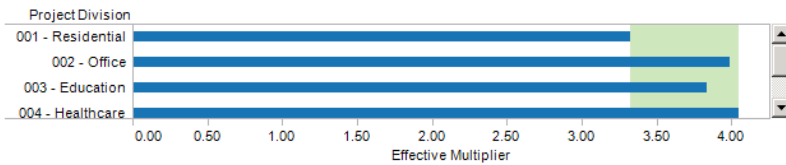
Cash Receipts by DivisionX



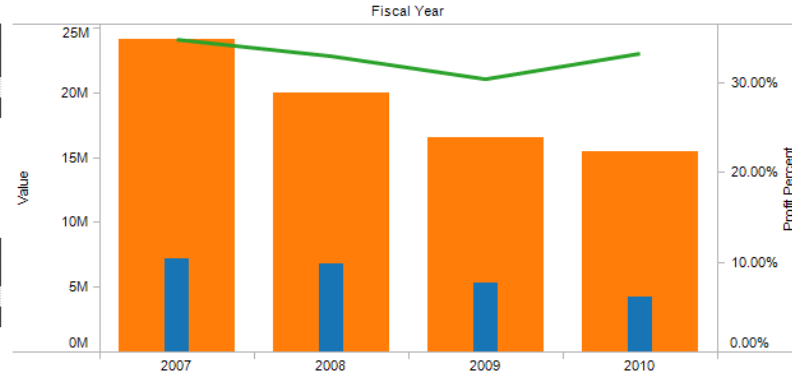
Gross Margin by Project Type



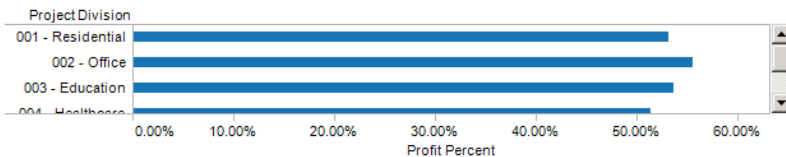
Effective Multiplier



Revenue Analysis



Profit Percent



# Dashboard – Accounting

Configure Window Help

**Applications**

- Accounting - Project Review
- Billing - Billing Rate Tables - Activity Code
- Billing - Billing Rate Tables - Expense Accounts
- Billing - Billing Rate Tables - Expense Categories
- Billing - Billing Rate Tables - Expenses by Vendor
- Billing - Billing Rate Tables - Labor Categories
- Billing - Billing Rate Tables - Labor Overrides
- Billing - Billing Rate Tables - Labor Rates
- Info Center - Employees
- Info Center - Projects
- Time & Expense - Expense Line Approval
- Time & Expense - Expense Report
- Time & Expense - Timesheet
- Time & Expense - Timesheet Line Approval
- Utilities - Change Period

**Clients**

Name	City (primary)	State (primary)	U:
Anderson & Associates, LLC	New York	New York	U:
Atlantic Research Corporation	Alexandria	Virginia	U:
Cartier Group of Lower Baltimore	Baltimore	Maryland	U:
Dalton Brothers Construction Co.	Las Vegas	Nevada	U:

**My Financial Reports**

- Default WIP Report
- Fitzgerald Engineers on my Projects
- Karens progress report one off
- Kevin PPV
- Month end Backlog by Branch
- My Projects Profitability
- PM Collection AR aging
- Project Detail Report w Proj info
- Standard Balance Sheet
- Standard Income Statement
- Stan's fav
- Weekly Accountability
- YTD Budgeted vs Actual Example

**Facebook**

Connect with friends and the world around you on Facebook.

- See photos and updates from friends in News Feed.
- Share what's new in your life on your Timeline.
- Find more of what you're looking for with Graph Search.

**Key Financial Metrics**

YTD Revenue	3,952,443
YTD Expenses	2,361,649
YTD Profit	1,590,794
Cash Balance	14,351
YTD Effective Multiplier	2.87
Number of Full-Time Employees	37
Average age of receivables	3,034
Period Range Profit Percentage	30%
Backlog	28,419,765
Outstanding AR (91-120)	
YTD - Utilization	53%
YTD Actual Overhead Rate	.45
YTD Billed	2,391,918
YTD Cash Change	-13,141
JTD Effective Multiplier	2.85
Opportunity Hit Rate	
Outstanding AR (Over 120)	2,459,208
YTD Realization Ratio	.98
YTD - Utilization [Direct/(Std - Benefit)]	-69%
v7.1.500 (KEVIN) -	

**My clients Over 60**

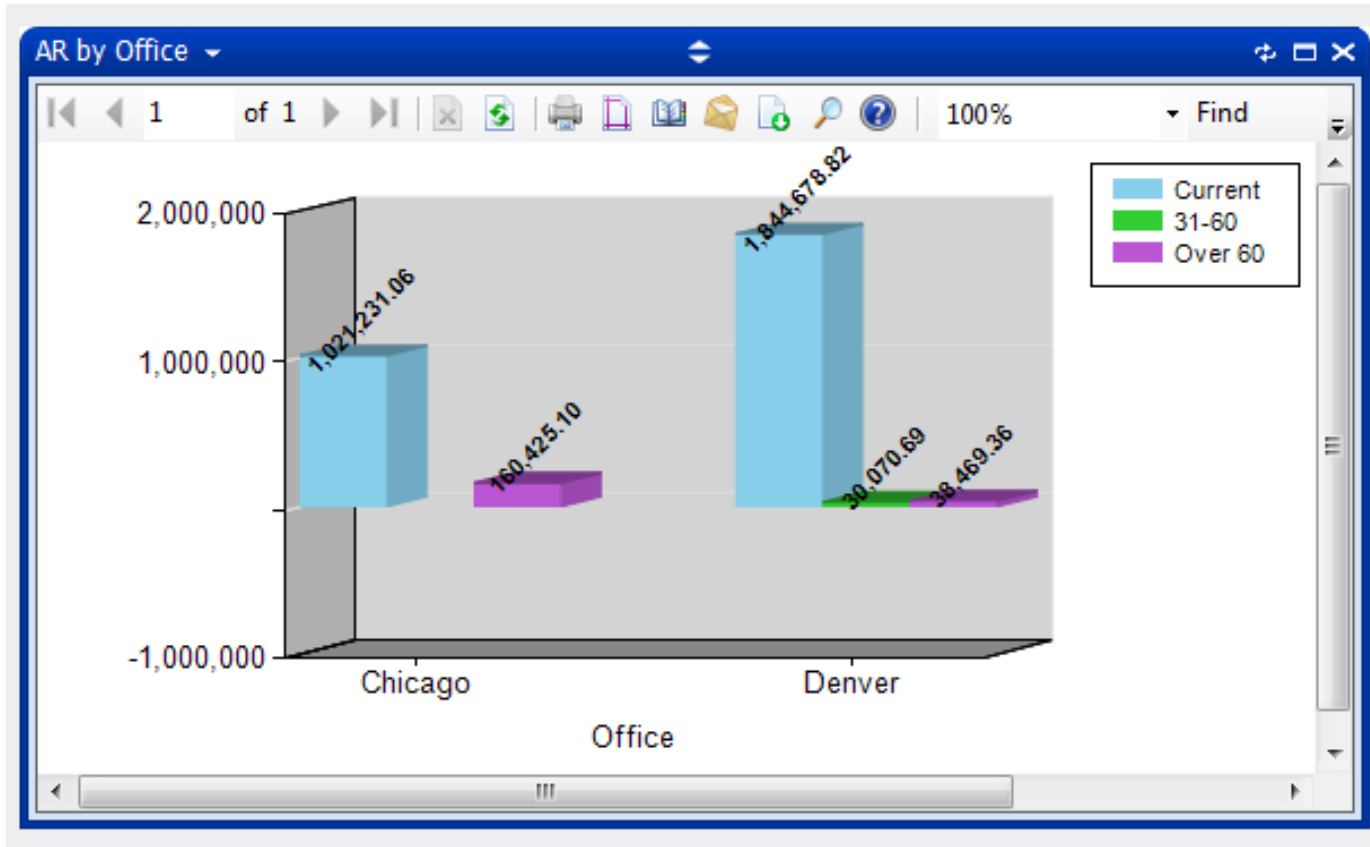
**Aged Accounts Receivable**

Aged as of 8/21/2013  
Demo Company Job-to-Date through 7/26/2005

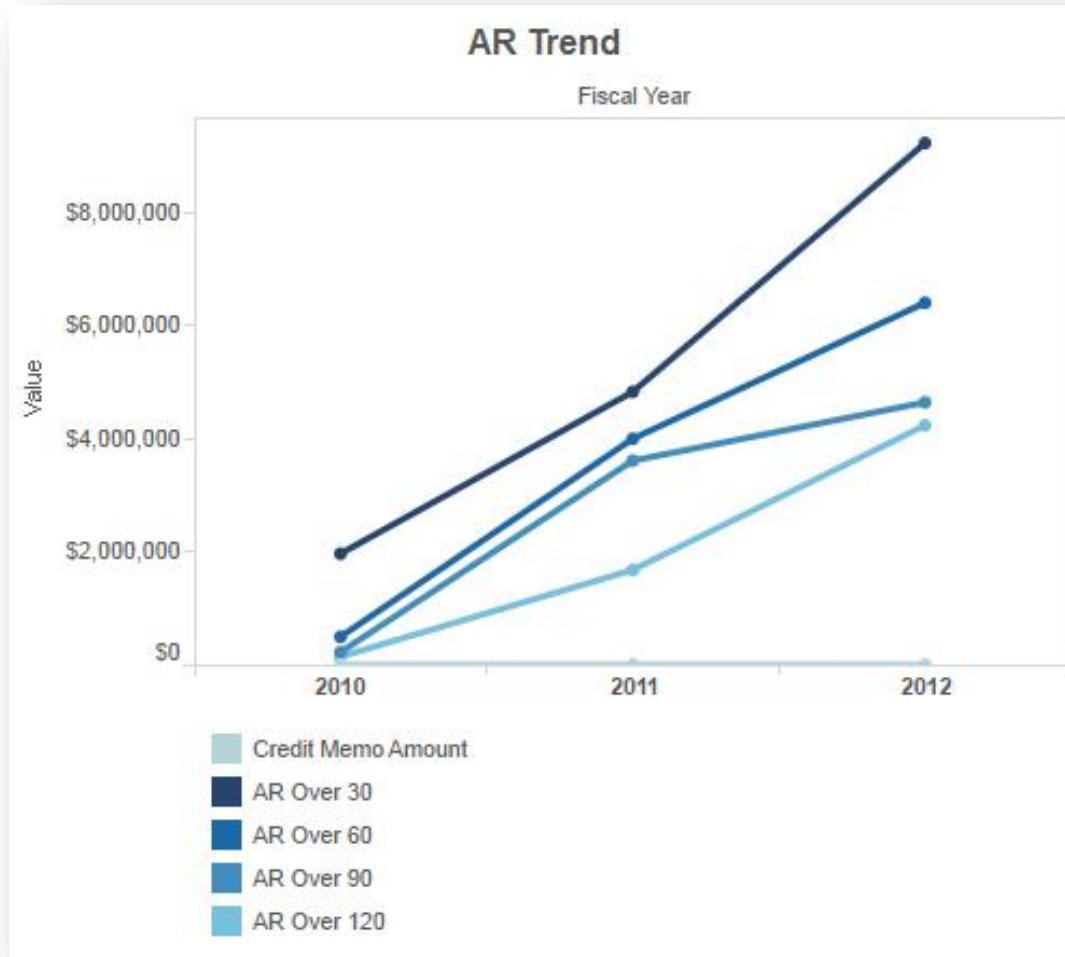
Invoice	Date	Balance	Current	31-60	61-90	91-120
Primary Client Name: Atlantic Research Corporation						
Project Number: 01999.01.000 Johnson & Johnson Research Center / Principal: Bartlett / Account Direc						
0000168	5/15/2004	2,695.74				
0000185	11/30/2005	6,187.50				
0000197	4/30/2005	122,342.50				1
0000212	5/30/2005	14,990.43				
0001035	6/15/2005	24,137.31				
0001036	6/15/2005	173,587.50				1
<b>Total for 01999.01.000</b>		<b>343,940.98</b>				<b>3</b>
Project Number: 020C2.00.201 Novvis Telecom Headquarters / Principal: Bartlett / Account Director: An						



# Dashboard – Accounting

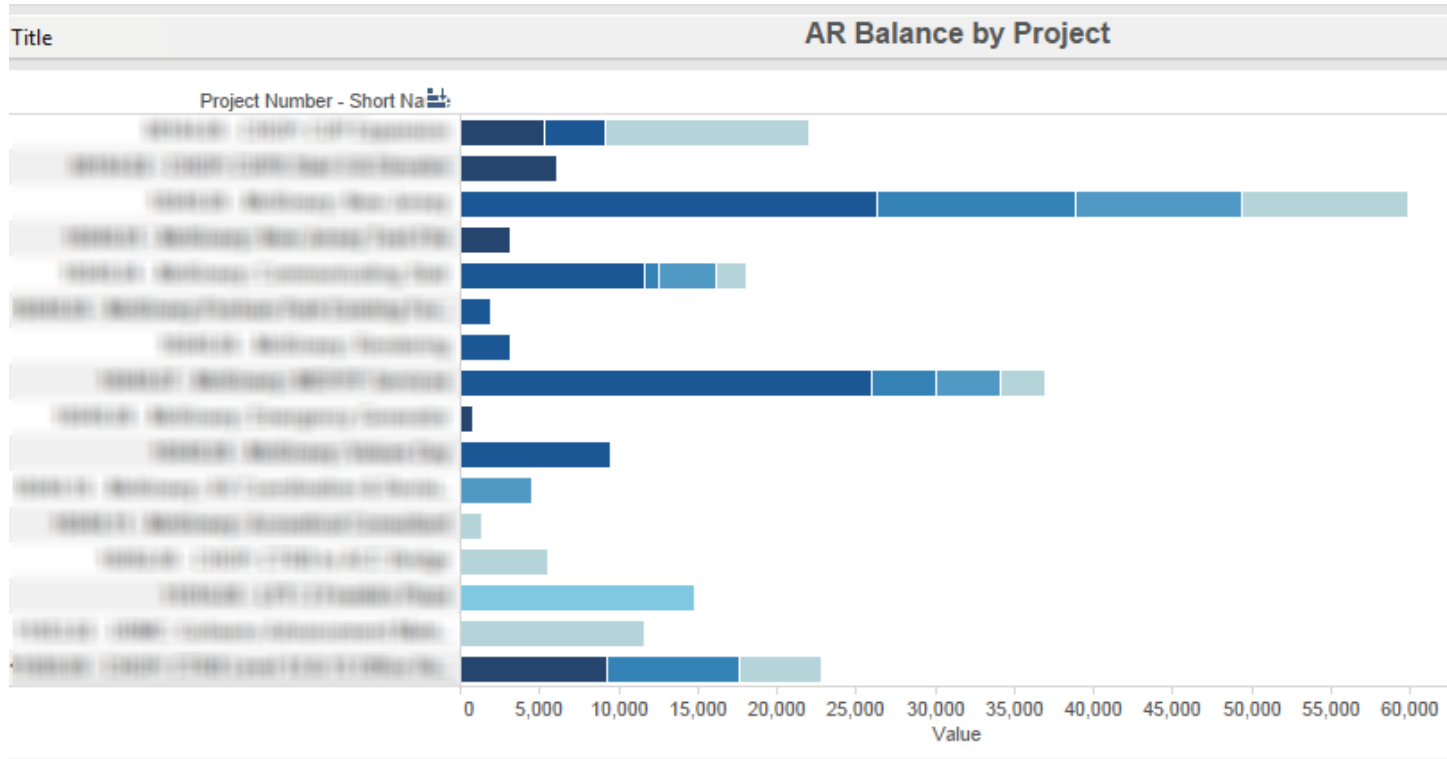


# Dashboard – Accounting

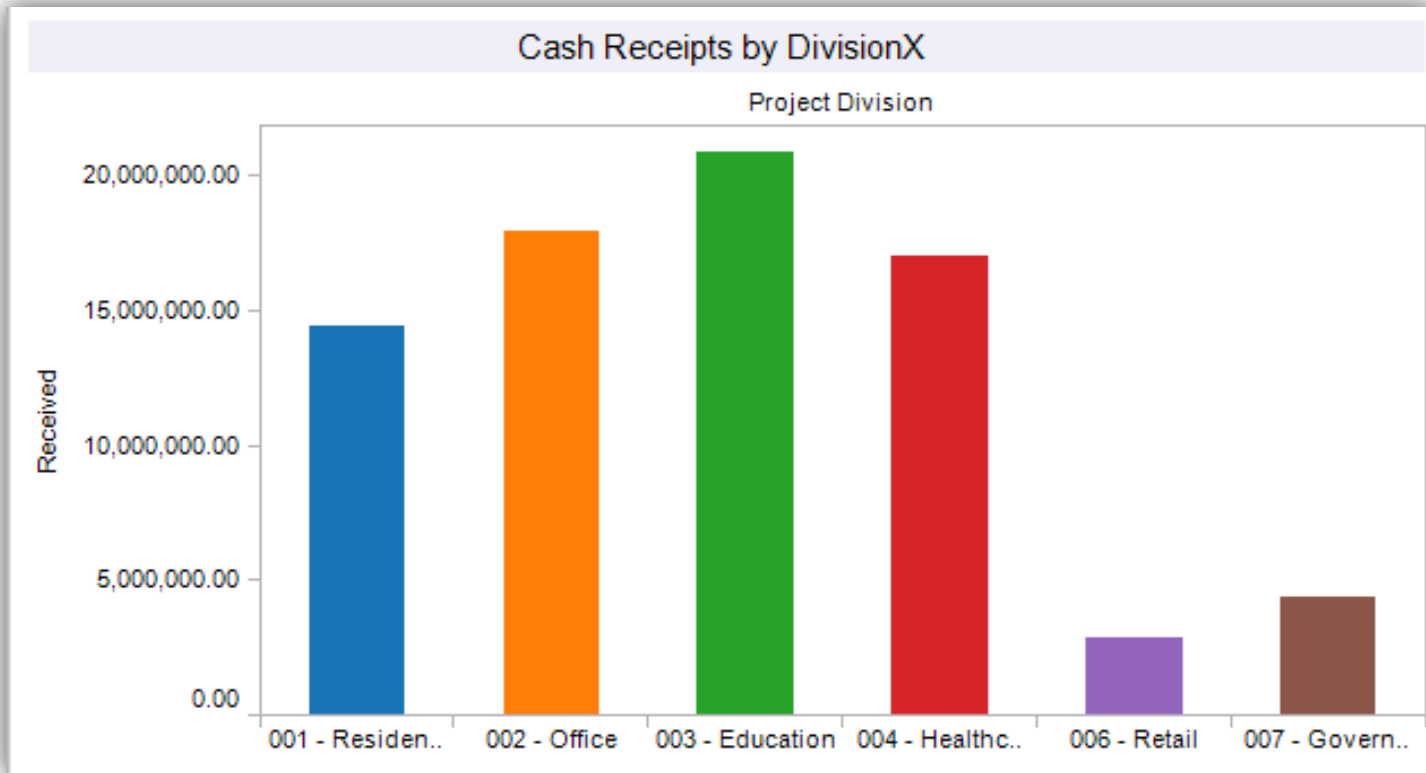




# Dashboard – Accounting



# Dashboard – Accounting



# Dashboard – Project Management

Configure Window Help

**My Shortcuts**

- Accounting -Accounts Receivable -Invoice Review
- Accounting -Budgeting -Project Budgeting
- Accounting - Project Review
- Reporting -Project
- Time & Expense - Expense Report
- Time & Expense - Timesheet

**Reports**

- ABC - JTD Time incl Unposted
- Aging By Client
- Office Earnings Chart
- Planning Performance Report
- Planning Performance Report 3 Projects
- Pre-Bill

**Important Links**

- 2013 A&B Bill Rates
- Deltek Support

**My Active Projects as PM**

Project	Short Name	
0000.TEST.2	<a href="#">A/E Project for Primary Care Additi</a>	Ve
2003.0050.0	<a href="#">Adelphi Research Lab</a>	Bi
1999.0150.0	<a href="#">Balboa Office Park</a>	D,
0010.9092.0	<a href="#">BWCH</a>	At
0994.6289.2	<a href="#">Faulkner Clinic</a>	At
1998.0010.0	<a href="#">Fenway Park Wall</a>	Th
2002.0190.0	<a href="#">Fenway Park Wall Seating</a>	Th
2000.2500.0	<a href="#">Fox Run Expansion</a>	At
2000.0020.0	<a href="#">Government Center</a>	Ci
1999.0100.0	<a href="#">Johnson &amp; Johnson Research Cent</a>	At
2000.0100.0	<a href="#">Kennedy School Addition</a>	Th
1999.0250.0	<a href="#">Marblehead Public Library</a>	Tc
0020.2020.2	<a href="#">Martinville Children's Hospital</a>	At
0040.1010.1	<a href="#">Moscone School</a>	Se
2002.5020.0	<a href="#">Newtown Village Airport Renovatio</a>	D,
2002.0010.0	<a href="#">Novvis Lab</a>	At
20C2.0020.1	<a href="#">Novvis Telecom Headquarters</a>	At
2002.0100.0	<a href="#">Oak Ridge Center - Feasibility Stud</a>	Te
1980.1800.9	<a href="#">Pershing VA Hospital</a>	Ve
0839.2890.2	<a href="#">Reston Health Facility</a>	W
2000.0050.0	<a href="#">The Mel Torne Auditorium</a>	Ci
0033.0909.0	<a href="#">VA Emergency Care Facility</a>	Ve
0021.0030.0	<a href="#">West End Women's Hospital</a>	At
1999.0130.0	<a href="#">West Glen Elementary School Addit</a>	Ci

**Contacts**

Name	Title	
<a href="#">Baldwin, Virigina</a>	Chief Executive Officer	Wes
<a href="#">Bovis, John</a>	Director of Marketing	Atla
<a href="#">Brown, Morgan</a>	President	San I
<a href="#">Childs, Richard</a>		
<a href="#">Collier, Paul</a>	Project Manager	Atla
<a href="#">Dacey, Kayla</a>	Project Manager	City
<a href="#">Davis, Mary Sue</a>	Contracts Administrator	City
<a href="#">Durnham, Charles</a>	Contracts Administrator	Vete
<a href="#">Edwards, Jonathan</a>	Vice President	BioH
<a href="#">Grafton, Susan</a>	Chief Financial Officer	Atla
<a href="#">Perkins, Marcus</a>		Vete
<a href="#">Sears, Joan</a>	Proposal Coordinator	Atla
<a href="#">Simpson, Michael</a>	Project Manager	Tow
<a href="#">Stringham, William</a>	Chief Information Officer	Dalt
<a href="#">Taylor, Wesley</a>	Project Manager	Atla

Ready



# Dashboard – Project Management

Navigator ▾

> Greater Baltimore Industrial Park

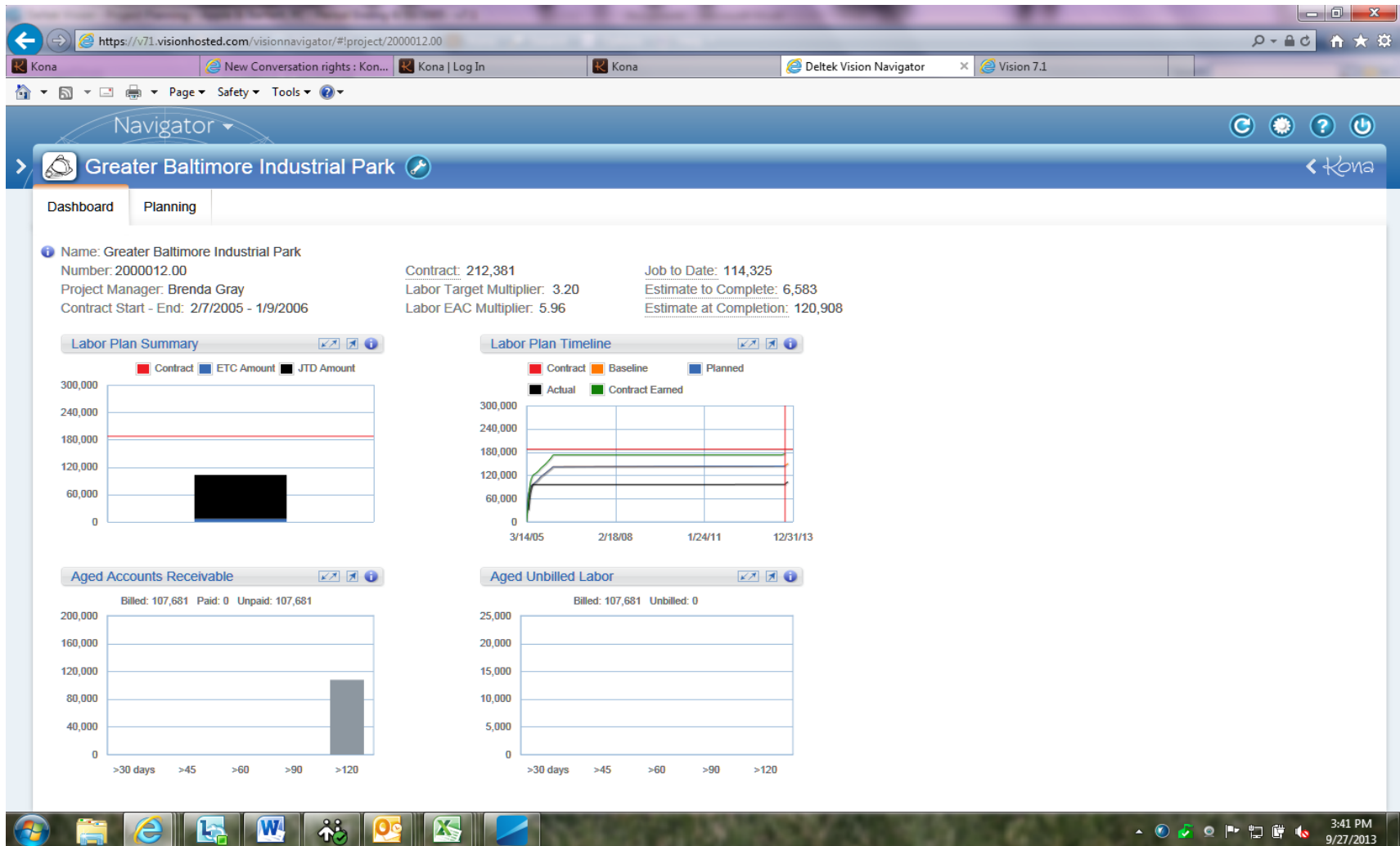
Dashboard Planning

**Actions** Plan saved. Plan and baseline published. Labor Target Multiplier: 3.20 Labor EAC Multiplier: 5.18

Contract **Labor** Expenses Consultants

Display	Level/Resource	Start Date	End Date	Contract	Baseline	JTD Amount	ETC Amount	EAC	Contract Less EAC				
	Greater Baltimore Industrial Park	3/14/2005	12/31/2013	187,381	150,470	96,247	23,538	119,785	67,596				
▾	Feasibility Study	3/14/2005	12/31/2013	67,005	67,005	89,567	11,263	100,830	-33,825				
+	Resource	ETC (Hrs)	3/14/05	4/1/05	5/1/05	6/1/05	7/1/05	8/1/05	9/1/05	10/1/05	11/1/05	12/1/05	1
×	William Apple	53	33	38	10	0	0	0	0	0	0	0	0
×	Tina Barrett	60	21	43	19	0	0	0	0	0	0	0	0
×	Laura Baugh	0	0	0	0	0	0	0	0	0	0	0	0
×	Emily Davisson	0	0	8	0	0	0	0	0	0	0	0	0
×	Lisa Evans	0	2	21	16	0	0	0	0	0	0	0	0
▾	Environmental Audit	3/14/2005	12/31/2013	30,094	10,740	6,680	2,940	9,620	20,474				
+	Resource	ETC (Hrs)	3/14/05	4/1/05	5/1/05	6/1/05	7/1/05	8/1/05	9/1/05	10/1/05	11/1/05	12/1/05	1
×	Richard Brady	26	27	42	19	0	0	0	0	0	0	0	0
×	Robert Lambert	40	0	0	0	38	34	40	38	0	0	0	0
▶	Facility Design	3/14/2005	12/31/2013	30,094	0	0	0	0	0	0	0	0	30,094
▾	Construction Administration	3/14/2005	12/31/2013	30,094	72,725	0	9,334	9,334	20,760				
+	Resource	ETC (Hrs)	3/14/05	4/1/05	5/1/05	6/1/05	7/1/05	8/1/05	9/1/05	10/1/05	11/1/05	12/1/05	1
×	William Apple	43	15	15	34	32	29	33	32	31	31	32	32

# Dashboard – Project Management



# Dashboard – Project Management

Apple & Bartlett, PC - Period ending Friday, 30 September, 2005 (ADM33) - Deltek Vision

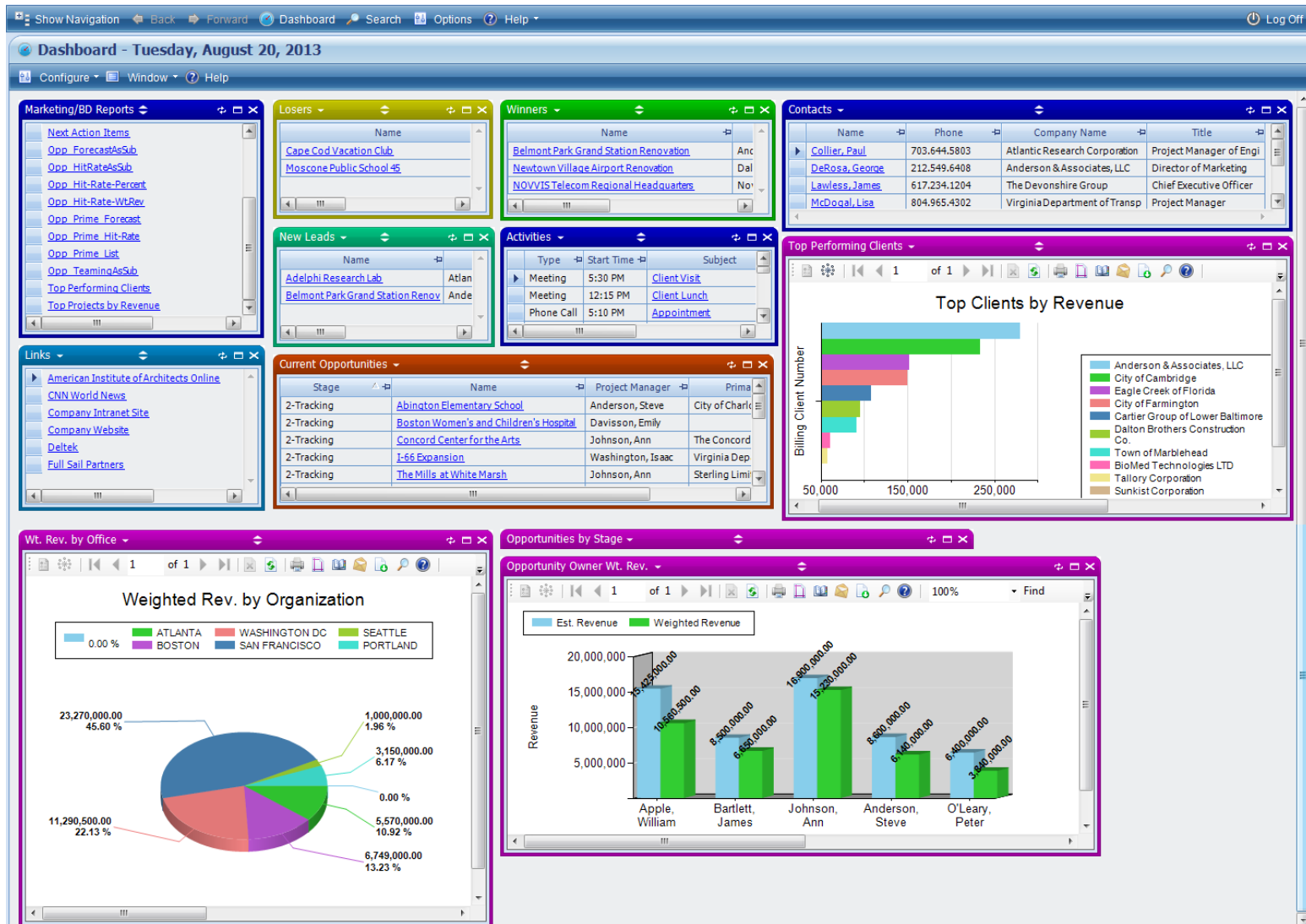
Resource Utilization

Save Help

Resource Name	Billable Goal Hours	Billable Utilization	Scheduled Ratio	Utilization Ratio	Sep 2005 07/09-30/09 Wed-Fri	Oct 2005 01/10-31/10 Sat-Mon	Nov 2005 01/11-30/11 Tue-Wed	Dec 2005 01/12-31/12 Thu-Sat	Jan 2006 01/01-31/01 Sun-Tue
Anderson, Steve	1551	14%	19%	70%	(60%)	(42%)	(18%)	(20%)	(45%)
Apple, William	1108	38%	38%	50%	(65%)	(58%)	(58%)	(47%)	(86%)
Ashton, Alan	1884	5%	5%	85%	(4%)	(4%)	(4%)	(4%)	(5%)
Barrett, Tina	1551	37%	37%	70%	(82%)	(86%)	(84%)	(24%)	(43%)
Bartlett, James	886	29%	29%	40%	(74%)	(74%)	(74%)	(70%)	(34%)
Baugh, Laura	1773	26%	26%	80%	(41%)	(51%)	(50%)	(17%)	(21%)
Brady, Michael	1994	37%	37%	90%	(80%)	(89%)	(89%)	(88%)	(33%)
Brady, Richard	1773	26%	26%	80%	(76%)	(85%)	(82%)	(22%)	(23%)
Cohen, Grace	1440	47%	47%	65%	(76%)	(102%)	(103%)	(77%)	(135%)
Davissou, Emily	1662	56%	56%	75%	(106%)	(110%)	(110%)	(121%)	(111%)
Evans, Lisa	1551	46%	46%	70%	(84%)	(92%)	(89%)	(85%)	(116%)
Fitz, Alexander	1662	0%	0%	75%	(0%)	(0%)	(0%)	(0%)	(0%)
Frankel, Evangaline	1330	0%	0%	60%	(0%)	(0%)	(0%)	(0%)	(0%)
Getson, Laura		3%	3%	0%	(6%)	(6%)	(6%)	(6%)	(11%)
Gonzalez, Luis	1994	49%	49%	90%	(95%)	(92%)	(92%)	(153%)	(136%)
Gray, Brenda	1551	38%	38%	70%	(81%)	(89%)	(87%)	(29%)	(55%)
Green, Elvis	1330	0%	0%	60%	(0%)	(0%)	(0%)	(0%)	(0%)
Hertz, Johnathan	1773	35%	46%	80%	(176%)	(209%)	(85%)	(83%)	(21%)
Hightower, John	1662	33%	33%	75%	(1%)	(17%)	(98%)	(97%)	(118%)
Johnson, Ann		32%	32%	0%	(247%)	(72%)	(70%)	(10%)	(56%)
Kelly, John		2%	2%	0%	(4%)	(4%)	(4%)	(3%)	(10%)
Lambert, Robert	1662	23%	35%	75%	(126%)	(145%)	(7%)	(7%)	(32%)
Langenbloom, Victoria	1884	0%	0%	85%	(0%)	(0%)	(0%)	(0%)	(0%)
Lee, Martin	1662	6%	6%	75%	(10%)	(10%)	(10%)	(11%)	(14%)
Lewis, Carl	1662	22%	35%	75%	(149%)	(170%)	(67%)	(8%)	(11%)
Little, Sally	1440	11%	11%	65%	(95%)	(0%)	(0%)	(27%)	(32%)
MacKenzie, Jonathon	1662	42%	42%	75%	(114%)	(96%)	(96%)	(90%)	(47%)
Miller, David		16%	16%	0%	(55%)	(63%)	(60%)	(0%)	(37%)
Morgan, Dwayne	1219	3%	3%	55%	(48%)	(0%)	(0%)	(0%)	(0%)



# Dashboard – Marketing & BD



# Four Hats Reports





# Reports – Executive

- Project Earnings by Department
- Employee Productivity by Department
- Balance Sheet (summary, detail, comparative)
- Income Statement (budget vs. actual, comparative)
- Cash Flow Statement
- Key Financial Metrics



# Reports – Accounting

- AR Aged
- AP Voucher Schedule
- GL Detail – Current Period
- GL Detail – YTD
- Invoice Register
- Employee Ledger
- Office Earnings
- Billing Reports



# Reports – Project Management

- Project Earnings
- AR Aged
- Project Progress
- Project Detail
- Unbilled Detail



# Reports – Marketing & BD

- Opportunity List
- Opportunity Forecast
- Opportunity Hit Rate by Percentage
- Opportunity Hit Rate by Revenue
- Opportunity Next Action Item



# Four Hats Roadblock to User Adoption



# Executive | Singular View

- Because we've always done it that way
- Obtain a global view
- Why are we instituting change?
- Is it the best decision for the company?



# Accounting | Control

- Allow others to help build & update info
  - Set-up workflows to alert notifications
- Provide access to Electronic Invoicing
  - Establish controls behind the scene
- Automate reporting
- Increase your expectation (don't assume)



# Project Management | Blinders

- Understanding the true role of a Project Manager
  - Health of the project including finance
  - Health of the client relationship
  - Manage staff's strengths and weaknesses
- Automate task lists to free them up for management
- Automate reports
- Automate activities (notes or timesheet comments)





# Marketing & BD | More ≠ Better

- What you are requesting, is it critical to make decisions?
  - Reports
  - Business Decisions
  - Merge Templates
  - Searches
- Is the info somewhere else?
- Think of ways to minimize workload
- Is it worth the effort? ROI?



# Additional Roadblocks

## The Human Element



# Case Story

# WJE

500-person engineering, architectural, and materials science firm headquartered in Northbrook, IL with 20 locations.

## ■ Challenge:

- › Inefficient paper-based project initiation for 7,000 projects annually
- › Inaccuracy, inconsistency, and redundancy
- › Inability to do conflict checks

## ■ Solution:

- › Reduce project initiation from several hours to several days per project to minutes
- › Gained visibility into organization's work backlog
- › Ability to share datasets to avoid wasted business development expenses and efforts
- › Real-time visibility so leaders could make better decisions.

## ■ Benefits:

- › Annual savings of \$1.8 million
- › Reduction in DSOs of 45 days
- › The cost to implement paid for itself over 30 times in just one year
- › Received Deltek's 2012 Project Excellence Award for exceptional Deltek solution implementation



# Case Story



35-person geotechnical and structural engineering firm located in California

## ■ Challenge:

- › Lack of visibility to manage and understand staff utilization

## ■ Solution:

- › Implemented ERP (Accounting, CRM, & Resource Planning)
- › Ability to recognize staffing needs and get people on board at the right time

## ■ Benefits:

- › Nearly doubled in size in first 15 months
- › Decreased inconsistency, inaccuracy, and redundancy

- › Disparate system causing inaccuracy, inconsistency, and redundancy

- › Workload forecasting and load balancing

- › Real-time visibility so leaders could make better decisions.

- › Ability to share datasets

- › Decreased overhead expenses, average days receivables, and employee turnover and surpassed the industry average

- › Increased utilization and net multiplier and surpassed the industry average



# Case Story



## Results:

Increase / Decrease	Utilization	Overhead	Employee Turnover	Net Multiplier	AR
<b>SAGE</b>	21%	(14%)	(62.5%)	24%	(41%)
<b>Industry Average</b>	3%	(6%)	(14%)	(1%)	(13%)



# Case Story



RICHARD AVELAR & ASSOCIATES

**50-person** forensic architectural and construction services firm

## ■ Challenge:

- › Looking for better insights into clients and opportunities.

## ■ Solution:

- › Standardized a paperless proposal submission process.
- › Real-time visibility so leaders could make better decisions.

## ■ Benefits:

- › Project it will cut the proposal process time in half.

- › Lack of standardization led to inaccuracy, inconsistency, and redundancy
- › No central repository and inability to do conflict checks
- › Ability to share datasets to avoid wasted business development expenses and efforts
- › With more than 1000 proposals / year, time savings equates to more than 750 hours or almost 5 months / year



# Questions?



# ***Connect with us today!***

Connect with **Full Sail Partners:**

 **LinkedIn:** <http://www.linkedin.com/company/full-sail-partners>

 **Twitter:** <http://twitter.com/#!/reachfullsail>

 **YouTube:** <http://www.youtube.com/user/reachfullsail>





# Contact Us



Sarah Gonnella  
VP of Marketing & BD  
sgonnella@fullsailpartners.com  
@sarahgonnella



Rick Childs  
Senior Consultant  
rchilds@fullsailpartners.com

Hearing what you have to say, whether criticism or praise,  
helps us provide you better information and service.  
Please fill out the survey and provide your feedback.

[www.fullsailpartners.com](http://www.fullsailpartners.com)

