VOGSY

ORGANIZING FOR MORE IMPACT

BACKGROUND

A fast growing digital marketing agency had grown over the past 10 years from a small business with 5 employees to over 35 employees. The company's goal was to continue to grow but in order to do that they needed to drive better cost and financial management by improving time and cost allocation, invoicing, identifying the most profitable clients, pricing of projects and service proposals, and cash flow management.

SITUATION

As the business grew they added new systems, at different times, to manage different business processes. They used a range of different systems to manage the following business processes:

- Account management
- Customer database
- Workflow order booking system
- Sale / quotation management
- Project management for service delivery
- Customer support
- Internal messaging/communications
- Emarketing
- Spreadsheets to compile data across systems

With multiple systems being used there was not a single integrated business management system to allow them to have a holistic view of a client engagement and associated business processes. Often the health of an engagement was not completely known until it was over.

GOAL

Their objectives were the following:
- Eliminate duplicate data input into multiple systems
- Streamline billing and payment recovery
- Have one central repository for customer information
- Track delivery costs against budgets
- Provide visibility of performance against KPIs

From their perspective, a performance dashboard integrating all of the information was going to be a vital element to measure key outcomes to improve and grow the business.

WHY VOGSY

VOGSY, an entirely new approach to managing Professional Services, met all of the company's requirements. VOGSY Professional Services Automation Platform focuses on *business outcomes*, offering process support and key performance indicators (KPIs) across every department associated with professional services sales, delivery and collection of fees. It is built on the Google platform to take advantage of all of the tools, capabilities, scalability and security that Google offers.

VOGSY leverages Google's G Suite range of office and collaboration products and offers PSOs an end-to-end, simple and sophisticated Professional Services Automation (PSA) solution that manages all core areas in PSOs:

CRM

- Quotes & SOWs based on Draft Project Plans
- Manage Margins, Pipeline and Forecasts
- Customer & Project Lifetime Updates & Alerts

FINANCE AND BILLING

- Chart of accounts, A/P & A/R, corporate P&L
- Automated billing with flexible schedules
- 24/7 real-time reporting

PROJECT MANAGEMENT

- Project, resource & budget planning
- Team collaboration & document management
- Milestones, deliverables and activities

DATA AND INSIGHTS

- Real-time sales, customer, project & utilization metrics
- Configurable KPI boards
- Revenue, performance, P&L - anytime, anywhere

TIME AND EXPENSES

- Smart, pre-populated timesheets
- Stopwatch for tracking time spent
- Notifications & approval on any device

ACTIVITY FEEDS AND COLLABORATION

- Updates on opportunities, project events & more
- 'My activities today' & 'My approvals'
- Chat & comment in context

RESOURCE MANAGEMENT

- Heat maps for billable utilization & availability
- Role & skill matching
- Automated resourcing suggestions

CONCLUSION

The VOGSY solution met all of the agency's requirements and even a few additional ones. They found that they could eliminate most of their existing systems, integrate a few with VOGSY, and let VOGSY be the single source of engagement for the entire company. Management now gained actionable insight into the business health and profitability while freeing the teams from administrative burdens so they can deliver more value to their clients.

"VOGSY is all you need to run your services business from quote to cash. Unlike traditional PSA solutions, we put the professional at the center of technology.

VOGSY is your single source of engagement for anything you need to drive the desired outcomes for your clients and for your own business."

Mark van Leeuwen, CEO
VOGSY