

Driving Efficient Workflows and Profitability



THE WILDERNESS AGENCY STORY

When Richard Kaiser launched Wilderness Agency, he wanted to create a comprehensive solution that would help companies address customer experience roadblocks. By examining how their customer relationship management systems affect their clients' experiences, Wilderness Agency helps companies finetune messaging for better engagement.

Wilderness Agency is a marketing team dedicated to helping businesses understand the needs of their audiences and connect with them in meaningful ways. Wilderness Agency sets itself apart from niche digital agencies that provide limited services, instead offering a wide array of marketing strategies from a team of contractors and providing clients with a single point of contact.

Wilderness Agency has worked with clients from startups to Fortune 100 companies and offers much-needed services to underserved markets like advanced manufacturing, government and agriculture. Headquartered in Dayton, Ohio, Wilderness Agency boasts a team of diverse talents and a high number of remote freelancers and contractors, making careful coordination and easy collaboration high-priority.

THE CHALLENGE

With a workforce scattered throughout the country, Wilderness Agency needed a comprehensive system that would make all relevant project information transparent and accessible in one place. But the project management software the team relied on previously was primarily task-focused and siloed from the rest of their software stack.

With no integration capability for the agency's CRM system, handoffs from sales to project teams lacked vital context and information, delaying project schedules. Supplementing with spreadsheets was little more than a stopgap, creating inefficiencies that kept workers from performing project-related activities that were quite literally costing Wilderness Agency in terms of reduced billability.

Sarah Moody, Controller at Wilderness Agency, explained, "As they say, time is money, and in this world, we're selling people's time."

Needless to say, the next project management software would need to make internal processes more efficient and project teams more effective. And it would need to be 100 percent user-friendly for Wilderness Agency's expanding roster of freelancers and contractors.

"We wanted a platform that actually looked attractive so our teams would use it," Josh Moody, Creative Director at Wilderness Agency, said. "The reality is that when your copywriters and designers have a poor user experience, it's harder to enforce things like time tracking, which is important for ensuring the profitability of the agency."

With user engagement near the top of the list of requirements, Wilderness Agency began the hunt for the right software.



WHY VOGSY

Having discontinued nearly a dozen different project management software solutions over the years, Kaiser had narrowed down what criteria the next software would need to include. Out of the top ten contenders, only VOGSY met every criterion on the list:

- A visually appealing platform that would engage team members
- Fully integrated into Google's G Suite
- Intuitive design, both for ease of navigation and to minimize learning curves
- Streamlined time tracking, project management and task management
- Trackable sales, project health, progress and profitability
- All project data and resources in one place

Right away, VOGSY's user-friendly interface stood out. Reliant upon outside contractors and freelancers to staff project teams, Wilderness Agency saw an opportunity to more easily attract human resources.

"Having a platform that is well designed is important to designers," Josh Moody said, "so it's important that when we bring them onto projects, they see we're continually sourcing best-in-class products like VOGSY."

Kaiser was particularly impressed with the software's capacity to streamline and automate business operations from sales to invoicing. By making all activities and relevant project data available to team members in one system, Wilderness Agency would achieve the efficiency it sorely needed.

"As a business owner, I need to know that the system is going to allow our creatives to find the resources they need so they can get in and out quickly and back to work," Kaiser said. Wilderness Agency was already using G Suite products like Google Docs, Sheets and Slides for real-time collaboration between project managers, copywriters, designers, videography and SEO teams on creative documents. VOGSY would make these accessible on one drive in the project management software.



Built on the Google Cloud Platform, VOGSY taps into the security, innovation and reliability Google is known for.

VOGSY also integrates with popular CRM solutions like Copper, allowing Wilderness Agency to eliminate data silos between sales and production. "Whenever I'm trying to find another piece to plug into the larger ecosystem of our technology stack, I can see what integrations already exist because VOGSY and Google are working together," Kaiser said.

THE SOLUTION

Only a few hours after Wilderness Agency teammates were introduced to VOGSY, they were logging hours with prepopulated timesheets and performing assigned tasks in the software. Based on Google design principles, VOGSY was instantly recognizable to Wilderness Agency and as easy to work with as G Suite itself.

"Transitioning from our existing system to VOGSY was exceptionally simple," Sarah Moody said.

With projects broken down into tasks, timelines and pertinent details, creative teams are gaining unprecedented clarity on project objectives and their roles in the workflow, allowing them to produce higher quality work, more efficiently. This has been critical for the company's virtual workforce.

Josh Moody explained, "Instead of just seeing the individual trees, they have a much deeper understanding of the entire forest. What VOGSY does is help them understand how their tasks relate to the larger ecosystem of the campaigns."

For project managers, the ability to see real-time schedules, budgets and profit margins in VOGSY on a daily basis makes it possible to make critical decisions—at the right time—in both the agency's and the client's best interest. Before VOGSY, decision-making was constrained by the only process available: extracting outdated information from dense reports once a week and performing time-consuming manual analysis.

"I've seen projects tank in a week from a budgetary perspective," Sarah Moody said. "Without current data on budget and hours, project managers didn't fully understand the impact or time commitment required to meet client requests, so profitability went from X to Y very quickly. With VOGSY, the ability to see those changes instantaneously is empowering our team to make sure we're catching these things sooner."

Now, a quick glance at the data displayed on projects and in visual charts allows Wilderness Agency to monitor progress and profitability in real time and at the most granular level of detail. At any time, stakeholders can check VOGSY's out-of-the-box charts to track sales funnel progression, employee billability, capacity and revenues, enabling them to ask important and time-sensitive questions and get immediate answers.

LOOKING TO THE FUTURE

Having spent some time with VOGSY, Sarah Moody predicts smooth sailing on all project fronts. Having accurate, real-time reporting and automated budget, margin and project health data is going to give Wilderness Agency a clear view of profits and project outcomes in the near and distant future.

A key feature that Sarah Moody anticipates will be a boon to cost control is project managers' ability to approve employee hours when they're submitted.

"We ran into issues in the past where people would go over on hours without any accountability," Sarah Moody said, "so we very much expect that with the right controls in place we can ensure that freelancers are sticking to their allotted hours instead of running over on billing with us, and indirectly with the client."

With an eye to digital transformation, Kaiser predicts that executing projects on the Google Cloud platform will aid the company's growth by attracting an emerging workforce almost entirely reliant on G Suite tools.

Most importantly, with VOGSY streamlining the entire quote to cash cycle, Wilderness Agency teams now have the resources needed to ensure profitability and a smoother workflow.

Kaiser added, "For us to run a more efficient ship, I see nothing but benefits for our customers."