

Increasing Revenue by 10% using Birdview PSA

RESULTS ACHIEVED:



50%

decrease in high-level project planning efforts



10%

increase in resource capacity



10%

increase in revenue

CHALLENGES

Before looking at Birdview, the team was using ClickUp which wasn't purpose-built for project management in professional services, so the ongoing maintenance and administrative efforts relative to output were not a sustainable ratio in the long term. There were some other challenges with the existing software.

Inefficient resource management

- The client's previous system lacked resource management features. The team was in need of a solution that would help them better track and manage project spending while increasing their overall capacity by optimizing resource management.

Inability to maintain a high-level view of all ongoing projects

- As the company grew, it became difficult for any one person to maintain a high-level view of all the ongoing projects. The client needed a solution that could provide this view across all stakeholders.

Overcomplicated task management

- The company's previous approach to task management was too granular, leading to distractions and ineffective use of data.

INDUSTRY

Engineering

TEAM FUNCTION

Professional Services

EMPLOYEE SIZE

30

COMPANY DESCRIPTION:

Founded in 1995, C-P Systems built a strong expertise in chemical engineering, equipment and piping design, project management and procurement, laser scanning, and much more. Since then, the company's customer base has increased to include Fortune 500 and smaller companies throughout a wide range of markets while still focusing on their core specialty chemical companies, including 3M.

WHAT WAS REPLACED

ClickUp



"Microsoft Power BI was the real kicker in being able to turn the various inputs into valuable data. Working with Birdview's BI team has been a huge value add."

There was little we had to customize on the base platform, which is great after experiencing software that required much greater administrative oversight. Implementation, both on the startup/training side and the setup/reporting/continuous improvement side, has been without a match in the industry regarding responsiveness, technical knowledge, and actions. We feel like we have been able to grow alongside Birdview for an overall win-win relationship.”

Jeff Baltz

Vice President

SOLUTION

After an extensive review of 17 different software options, C-P Systems selected Birdview PSA as the best fit for their business needs. The team was looking for efficient, purpose-built project management software that integrated timesheets, budgets, calendars, and reporting. “Birdview checked all the boxes, which wasn’t unique in and of itself but did so in a clean, efficient manner.” Here is the Birdview PSA functionality that appeared to be the most helpful for the C-P Systems team.



Project tracking

The client uses Birdview PSA to simplify task management, thus letting the team focus on solid, actionable data rather than being distracted by irrelevant information.



Business Intelligence

C-P Systems uses built-in MS Power BI to analyze a great amount of data both on a project level and at a macro company level. As the company grew, Birdview's business intelligence feature stepped in to make high-level project management a manageable task and maintain a high-level view of all the projects going on simultaneously. Power BI allows the team to review and share data across stakeholders to drive management and administrative decisions.



Resource Management

Birdview's resource management feature provides clear value that is easy for everyone to understand and get behind. The integrated scheduling and priority management tools allow for big-picture resource management, helping the client get ahead of the project schedule, hit milestones, and focus efforts on the right projects. With Birdview PSA, C-P Systems can quickly identify which projects require more resources and easily allocate them, ensuring that all projects are delivered on time and within budget.



Financial Management

The financial management module provides visibility to analyze a range of KPIs related to project budgets. This feature provides visibility into project costs and, with this data, the client is able to project, adjust, and resolve any budget issues in a more timely manner. With Birdview PSA, C-P Systems can monitor project expenses in real-time and take action when needed to ensure that the project stays on budget.

RESULTS

Once the C-P Systems selected Birdview PSA, their team was able to quickly utilize the existing tools and functionality of Birdview to add immediate value, with the biggest improvement being **the ability to get ahead of project spend tracking.**

Birdview helped the C-P Systems team to manage project budgets proactively rather than reactively, resulting in a **significant improvement in resource management and tracking project spending.**

The client estimated that their **capacity increased by 10%** thanks to better resource management and utilization. Birdview PSA allows keeping a more even workload and quickly diverting resources to projects that need attention.

One key factor that C-P Systems was looking for when selecting project management software was achieving near-universal buy-in from all levels of the organization to truly add value that exceeds the efforts to input data. Birdview's simplicity helped achieve that buy-in, significantly **improving real-time project and resource management data used to drive critical business decisions.**

Furthermore, the client also mentioned that the **implementation and support for Birdview were of great help to the team.** Whether the client has a question, issue, or feedback for improvement of the software, it has always been met with understanding and responsiveness. The highly technical and forward-looking team at Birdview has been able to act on the client's feedback to continuously improve the software, resulting in an overall win-win relationship.

As a result, Birdview PSA has provided the C-P Systems team with significant improvements in project and resource management, resulting in increased capacity and agility.

