



# **How Tool Consolidation Reduces Inefficiencies in Professional Services Organizations**

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# Introduction

Professional services organizations have a comprehensive project lifecycle.

Although each company would have its own unique workflow, typically there are seven general stages:

## **1. Business Development:**

generating and closing sales opportunities.

## **2. Business Development:**

reviewing all on-going and planned projects and re-prioritizing based on the size of the opportunity, resource availability, profitability, etc.

## **3. Planning:**

creating a detailed project plan, project schedule, allocating resources.

## **4. Execution and Delivery:**

working on the actual project, delivering services.

## **5. Monitoring and Control:**

reviewing project status, adherence to schedule, and budget.

## **6. Project Accounting:**

reviewing and approving labor and non-labor costs, invoicing customers, tracking payments.

## **7. Review and Optimization:**

ongoing monitoring of all in-progress projects and continuous optimization based on new resources constraints or lessons learned from the completed projects.

Each stage involves typically different departments that often use their own tools to perform their specific task. With multiple tools being used for a single project, there is more room for error and workflow inefficiencies, which can extend deadlines and delay delivery of projects to clients.



***19% of projects fail due to a lack of visibility.  
- a study by Standish Group***

The goal of this whitepaper is to help organizations improve their project visibility and overall process efficiencies. It covers the impacts of having too many tools, industry best practices for tool consolidation, and professional services client success stories.

Chapter one

# The Problem with Having too Many Tools



# The Problem with Having too Many Tools

A typical professional services organization uses anywhere from 10 to 15 various types of tools (not counting different instances of the same kind, e.g., four different team collaboration apps).

## Standard tools professional services organizations use:



Spreadsheets



Team collaboration



Time tracking



Task/project management



Expense tracking



CRM



Resource management



Project intake



Accounting and Invoicing



Ticketing



Document management



Inventory management



Procurement



HR



***55% of organizations do not have access to real-time project KPIs. - a study by Wellington***

Most companies do not start with a plan to have a myriad of different applications from the get-go. It happens naturally as time passes and the company matures. New processes are introduced, new managers are hired, and, as a result, more and more new software products are acquired and deployed.

With a constant focus on growth, many professional services organizations do not make it a priority to allocate time and look inward to review their operations for potential inefficiencies and bottlenecks. As a result, as the company keeps growing and scaling, things can start falling through the cracks, more deadlines can be missed, more delivery promises go unfulfilled and more clients may become frustrated and unsatisfied. And that's just the tip of the iceberg.

After interviewing hundreds of professional services organizations, we have identified the following list of typical challenges associated with the use of too many business applications:

**No single source of truth for a project or financial data** - Without a single, up-to-date system to reference, accessing project financial data across multiple tools can be cumbersome and time-consuming.

**Inability to run accurate capacity planning and utilization reporting**

- It is challenging to plan resources for future projects when there is a lack of visibility into coherent resource data across all teams, project schedules, time allocations, vacation, etc.

**Lack of visibility into real-time project data** - Due to data being managed on multiple systems, it is often stale or outdated by the time it is gathered and collated for presentation.

**Redundant manual labor for entering the same data into multiple systems** - Often, organizations spend an absurd amount of time manually entering data into different systems, which is a highly error-prone process.

**Unnecessary costs of too many systems** - Most on-premise or cloud software require either internal or external resources to support and maintain, and such costs can add up relatively fast.

**Tool fatigue** - Teams are often overwhelmed with being trained on multiple tools and may have difficulty remembering how to use numerous applications.



**Flow interruption** - Switching between tools commonly leads to losing context, focus, and increases overall time to complete a task.



*It takes an average of **16 minutes** to refocus after an employee is distracted. - a study by Wellington*

**Complicated company workflow** - With too many tools, knowledge transfer within an organization becomes a risk area, and turns the few people who understand the entire workflow into a bottleneck.

**Difficulty with digital transformation** - Relying on too many tools means data is scattered across different applications, which can make it challenging to go through digital transformation and achieve operational excellence.

 [Do any of these issues sound familiar to you?](#)

Chapter three

# Tool Consolidation Best Practices



# Tool Consolidation Best Practices

Now that we have identified the complications of utilizing too many business applications, below are some of the best practices for tool consolidation for professional services organizations.

## Encourage Feedback

Before you begin any tool consolidation activities, it is crucial to make it culturally acceptable for your team to express any pain points of existing tools openly.

A best practice is to welcome users to collectively and objectively raise concerns around user-friendliness, flexibility, and existing tools' adaptability. You can do this by sending out regular user surveys, collecting and analyzing metadata from tools, reviewing user adoption dashboards, and simply having honest conversations with your team members.

## Do Not Look For One Silver Bullet

On a path to tool consolidation, some companies take it to the extreme and try to choose a single platform to handle all company operations. And while selecting a complex ERP system, like Netsuite or SAP, might seem like a good idea, experience shows that the one-app-to-rule-them-all approach rarely works. These mega-platforms are known for their long and cumbersome implementation cycle, which sometimes takes years, and once implemented, they are notoriously difficult to adopt and use. It is also rare for one tool to be equally great at all functions.

If your organization has one of these systems already in place, try to identify what modules are being used regularly, meet all or most of the business requirements, and offer a good user experience.

All other modules that don't meet these criteria are candidates for a replacement by better, more user-friendly, and specialized platforms.

## Combine Applications by Function

While we do not recommend looking for a single tool to complete all functions of a project lifecycle, we suggest trying to have as few platforms as possible. Our clients have seen success with consolidating tools into three or four groups based on their functional utility; see examples below.

### Four Platforms:

#### 1. ERP

- Human Resources
- Procurement
- Inventory Management

#### 2. CRM

- Sales Management
- Quoting
- Ticketing

#### 3. Finances

- Accounting
- Invoicing

#### 4. Work Management

- Task and Project Management
- Resource Management
- Document Management
- Time & Expense Tracking
- Team Collaboration
- Project Intake

## Three Platforms:

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By consolidating tools, you will find that the increase in your team productivity and the reduction of operational costs will outweigh the sunken costs of tools that you have acquired in the past.

## Get Rid of Doppelgänger

It is quite common in companies that have experienced fast growth to have different teams using various applications that serve the same purpose. For example, one part of the organization will be using Slack as their communication platform, while the other swears by MS Teams. You might discover that your project management stack consists of Asana, Basecamp, Trello, some in-house tools, and an unhealthy amount of spreadsheets.

As we discussed before, this assortment of tools and technologies leads to various issues, including a lack of reliable unified data, inability to forecast resources accurately, and more.

With that in mind, it is recommended to have all teams using a single functional platform that can meet both the needs of each team and the company in general.

## Synchronize your Platforms

Now that you have all unique functional platforms humming along, it is time to connect them.

If you manage to fully integrate your ERP, Financial, CRM, and Work Management software, your organization will be rewarded with many benefits. Here are just some of the advantages of having a fully synchronized tool stack:

## **1. Better client handoff process between sales and implementation.**

The implementation team will be automatically provided with accurate client information gathered during the sales process, so they can better understand the clients' expectations and requirements. With all data available, the handoff can run more smoothly, and the client can be set up more efficiently.

## **2. Elimination of unnecessary data entry, human error, and data transfer delays.**

By synchronizing all tools, teams can access accurate data at all times and avoid unnecessary back and forth between departments.

## **3. Project managers can see the financial implications of their actions.**

Foresight to financial impact usually leads to cautious, more informed decision making. Therefore, project managers can take a proactive approach and adjust project schedules or assignments accordingly.

## **4. Decrease of the quote to cash time.**

With all departments using a synchronized tool stack, the entire project workflow can be much more efficient; this can result in fewer errors, faster time logs and expense collection and approval, and quicker delivery to clients.

## **5. Drastically faster report creation.**

With all information available in synchronized tools, your team no longer needs to spend hours manually creating reports using spreadsheets. Accurate data can easily be pulled into a report or a dashboard and provided to leadership for project updates.

Chapter four

# Client Tool Consolidation Success Stories





# Client Tool Consolidation

## Success Stories

Now that we identified the problem with having too many tools, the benefits of tool consolidation, and recommendations on how to move forward, it is time to provide some real-life examples.

Next, we have two success stories from professional services clients that describe the pain points their organizations faced, how they consolidated their tools, and the positive results they have both achieved.

## Bond Brand Loyalty - Digital Transformation Success Story



Employee size:

**500+ Employees**

Industry:

**Digital Marketing & Loyalty Management**

### What Tools Birdview Replaced

Microsoft Excel, Microsoft Project, Celoxis, Outlook 365

### Organization Profile

Bond Brand Loyalty solves complex customer challenges with a unique blend of human-centered design, data science, and loyalty mechanics that transforms how brands win, serve, and keep audiences. Working globally with iconic brands, Bond is sought after for transformative digital strategies, executions that are aligned to real human needs, and impressive acceleration of results.

### The Challenge

Bond was using several different tools to manage their projects and finances, such as Microsoft Excel, Microsoft Project, Celoxis, and Google Docs, as well as Outlook 365 for project communication updates. Relying on numerous tools made it difficult to view accurate data in a consolidated way to make correct business decisions.

## The Solution

Implement a single work management platform and integrate it with company ERP (NetSuite) to better represent what is happening within the project life cycle, identify the projects that are tracking well, and highlight the ones that are at risk.

## The Results

Bond consolidated their previously used tools and now utilizes the work management, team collaboration, budget, and expense tracking features in Birdview. Since implementing Birdview in 2018, Bond is able to proactively identify projects experiencing challenges and provide the right support to get them back on track, quickly.



*The power of being able to compile all this information from different systems into Birdview helps us to elevate our business.*



Stephanie Culp  
Director of Client Operations

## CenturyLink - Tool Consolidation Productivity Success Story



Employee size:

**10.000 Employees**

Industry:

**IT Services**

### What Tools Birdview Replaced

Internal Ticketing and Case Management Tool

### Organization Profile

CenturyLink is a technology leader delivering hybrid networking, cloud connectivity, and security solutions to customers worldwide. CenturyLink provides secure and reliable services to meet businesses and consumers' growing digital demands through its extensive global fiber network.

### The Challenge

The Escalation Management department had difficulty efficiently gathering accurate information from their internal ticketing and case management tool. Due to the large-scale of CenturyLink, there are multiple entities, which led to data being scattered across various systems. By utilizing an excessive amount of tools throughout the organization, the Escalation Management teams' productivity suffered, and leadership lacked the visibility needed to make informed business decisions.

## The Solution

Find a project management tool that enables CenturyLink to efficiently manage project intake, pool all data into one system to complete ticket and case management tasks.

CenturyLink worked with Birdview's Customer Success team to create custom business intelligence dashboards that pulled all relevant data into the platform to run the project and financial reports for executives in a matter of minutes.

## The Results

Through faster billing and smoother project intake, CenturyLink has improved cash flow by decreasing delivery to cash time by 15%. Additionally, Birdview enhanced the utilization of CenturyLinks' team by increasing overall productivity by 60%.

Chapter five

# Create a Single Source of Truth with Birdview



# Create a Single Source of Truth with Birdview

Gain and deliver real-time visibility on your key client engagements through Birdview.

There is no need to sift through multiple spreadsheets, emails, and systems - all essential information is housed in one convenient place.



*Birdview becomes your single source of truth.*

*“If it’s not in Birdview, it’s not on my radar... We’ve been able to streamline our project management efforts because we receive all of the information we need to kick off work at the beginning.”*



Paige Gerber

Senior Director of Content Experience



# Deliver more and Grow Faster with Birdview

[Click here to learn More](#)

