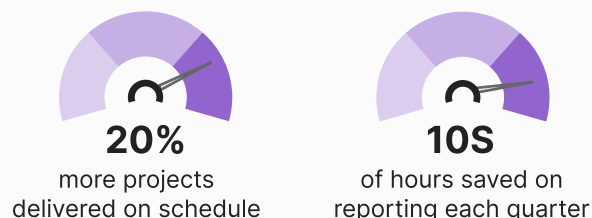


Improving Reporting and the Use of Resources for Local Government

RESULTS ACHIEVED:



CHALLENGES

Complex resource management

- One of the key challenges was organizing people to complete the work efficiently across 24 divisions of county government. The company also needed a solution that allows setting up access restrictions across team members.

Time-consuming reporting

- The existing project management software lacked the capability to provide the reporting the organization needed for customer divisions and the auditors. As a result, it took managers about 12 hours of manual labor to merge excel spreadsheets and move data and complete a report every month.

Lack of adoption of the existing solution

- Before switching to Birdview PSA (formerly Easy Projects), the team was using the FileMaker-based program and Wrike. The existing project management solutions were not set up well in the implementation phase so the team struggled using the software.

Need for improved time tracking

- Even though the organization had a decent time tracking solution to keep track of their hours, the team was looking for a more flexible and feature-rich time management solution to provide customers with accurate time logs.

INDUSTRY

Local Government

TEAM FUNCTION

Marketing Services

EMPLOYEE SIZE

2200

COMPANY DESCRIPTION:

The Board of County Commissioners is the governing body of Polk County, FL.

The organization adopts ordinances and resolutions to establish public policy, levy taxes and fees and provide county services such as garbage collection, and infrastructure, including roads and water.



WHAT WAS REPLACED

- FileMaker Pro
- Wrike



"When we were looking to make a change, I came straight to Birdview PSA . I knew what I wanted, and your sales team was able to deliver. Birdview PSA delivers a robust, easy-to-use platform without busting the budget. The software is easy for my team to use to create activities and enter time. For me, it is the ease of reporting."

Mianne Nelson

Communications Director

SOLUTION



Customization

Thanks to role-based permissions, the team was able to assign levels of access by roles, which, as a result, helped clean up data.



Resource Management

Birdview PSA resource management tools provide the organization with full real-time visibility into its resources. As a result, the team evens out the workload by being able to better see what activities/tasks its members are assigned to. It also helps to ensure none of the team members, especially high performers, are overloading.



Custom Reports

Thanks to the BI-powered reporting features, the team can now create accurate reports to share with the rest of the organization and clients. These data can also be easily analyzed and used for further decision-making. For instance, based on reports on resources, managers can evaluate where the team is over/understaffed and can make changes.



Time Tracking

With the Birdview PSA time tracking capabilities and My Assignments feature, teams can easily log their time, manage their daily activities, and focus on tasks that matter the most.



Custom Forms

With the help of Birdview PSA, the team builds a customized intake form for projects. This has improved the data used to create projects, assign staff, and track activities and sub-activities.

RESULTS

The team was looking for a solution to improve their time tracking for customers and ensure better use of people resources. Birdview PSA was chosen as their go-to solution for resource and project management. The software is currently used for **managing all of the team's projects**, including the ones for a cable television station.

The in-house marketing agency now has a **much clearer view of who is assigned to projects** and **where they are in the work process**. As a result, **20% more projects were delivered on schedule**.

The organization's Communications Director, Mianne Nelson, also mentioned that, after implementation, she **decreased her reporting time by 10s of hours each quarter**. The team also noted that the implementation was simple, and the support team helped to **customize the software in accordance with the organization's needs**.