

Global Professional Services Firm Realizes Double Digit Year-Over-Year Revenue Increase Using Dploy Solutions

EXECUTIVE SUMMARY

CLIENT

- > Global professional services firm

CHALLENGES

- > Delays in understanding planned versus actuals around KPIs
- > Difficulties pinpointing root causes for marketing, sales or project misses
- > Clearly understanding the impacts of countermeasures

STRATEGY

- > Use Dploy Solutions, including KPI Management, Project Management and Strategy Deployment, to closely monitor and manage companywide performance

RESULTS

- > Supported double-digit growth after several flat years
- > Increased executive and manager focus on problem solving versus compiling data
- > Increased organization-wide transparency and accountability

KEY LEARNINGS

- > Putting context around misses leads to smarter improvements
- > Enabling company-wide transparency increased accountability and pride in accomplishments
- > Data integration is key to speeding up critical decision making

Continuous improvement is essential for any company. But for already disciplined companies, driving performance gains year after year can be difficult. Find out how a global management consulting firm used Dploy Solutions to improve business performance and boost year-over-year revenue growth.

A Commitment to Continuous Improvement

Headquartered in the U.S., this professional services consulting firm has offices across multiple continents. It serves companies across an array of industries, ranging from manufacturing to food and beverage to aerospace and defense. For nearly 20 years, it has used a unique combination of methodologies to help clients accelerate growth.

A Matter of Timely Visibility

As a performance focused and data-driven company, the professional services firm clearly understands the importance of collecting, consolidating and regularly evaluating key performance indicators (KPIs) in pursuit of annual goals. The firm must constantly juggle hundreds of projects and objectives across its geographies and divisions, and it knows that timing matters when it comes to responding to missed targets or other issues. The problem was that the firm had minimal capabilities for tracking KPIs, and its existing systems were not integrated. That meant that the processes for gathering KPI data were manual and cumbersome, which limited the timeliness and types of data managers and decision makers were able to see at any given time, while also delaying responses to issues or misses.

Upgrading to More Robust Capabilities and Data Integration

According to the VP of Technology for the firm, the leadership team recognized that eliminating manual data entry processes could buy managers and other decision makers valuable time for identifying and troubleshooting misses or other issues. The ability to easily integrate data from across systems, combined with other new capabilities, made Dploy Solutions a perfect fit. The firm implemented the Dploy Solutions KPI Management module in mid 2017, and integrated data from across business-critical systems, including its Salesforce CRM system, its Microsoft Dynamics financial reporting system and its internal scheduling and knowledge repository tool.

“With KPI Management, we have a much better window into what’s driving our performance. Moreover, we not only can identify issues faster, but we can get to the reasons and corrective actions for the misses faster.”

> **Director of Business Development**

The Director of Business Development said that KPI Management has been an invaluable addition because it not only helps the management and executive teams quickly view and understand target versus actual numbers, but it also gives them the ability to drill down into root causes for misses. “With KPI Management, we have a much better window into what’s driving our performance. Moreover, we not only can identify issues faster, but we can assign reason for the misses,” he explained. “We can also tie action items and root cause countermeasures to specific reasons which allows us to measure the impact of our actions over time.” He continued saying that compared to the firm’s previous approach, which was essentially based on variance reporting, the new system is much more accurate, actionable and effective, citing the firm’s tracking of lead flow as an example.

“In our firm, we closely track lead flow as well as opportunities both from a number and a dollar’s perspective against our targets. KPI Management enables us to closely examine the reasons for misses. For example, in late 2017 and early 2018, we noticed that the number of year-over-year opportunities were declining while the dollar amount of the opportunities was holding steady,” said the Director of Business Development . “That meant the value of new opportunities was up significantly, but we were still concerned about the declining numbers so we decided to go back and start examining things more deeply.”

In this case, the firm integrated lead data from Salesforce and aligned it with KPIs in Dploy. This enabled the marketing and sales teams to look at misses and put context around the reason for each miss. “We asked questions like how many marketing qualified leads are we getting? How many of those are we converting to sales qualified leads? And how many of those sales qualified leads are actually turning into something fruitful?... KPI Management and the countermeasure problem solving capabilities in Dploy enabled us to explore these questions more easily to figure out where we needed to make adjustments in our marketing and sales processes,” he added.

He said the data integration capabilities in Dploy Solutions are especially important to the firm becoming a more flexible and responsive business overall. The key has been deploying the solution to every member of the executive and management teams across all of the firm’s business units and geographies.

“With data integration, we are now much more focused on the leading indicators of the business. We can report on KPIs on a weekly basis and really get down into granular details about what’s happening.”

> **Vice President of Technology**

Beyond KPI Management, the firm also uses the Dploy Solutions Strategy Deployment and Project Management modules. The firm manages all of its strategic initiatives using Strategy Deployment: “We have been using the Strategy Deployment module for over 15 years now. We review how well we’re executing against strategic initiatives on a monthly basis using Strategy Deployment. The same goes for projects. When we have key projects in the business, obviously we want to understand who’s going to be doing what and the project management capability and alignment module helps us do that.”

Moving forward, the firm also plans to use Project Management and KPI Management capabilities for managing consulting engagements with clients. According to the Director of Business Development , this will enable the firm to ensure that project plans are solid and being measured with the right metrics at the right frequency. “Dploy includes everything we need to manage client engagements,” he said. “It will enable us to understand how we’re doing from a task perspective and more easily determine whether or not we are getting done what needs to be done by more accurately measuring how much we are moving the needle for our clients.”

Greater Transparency and Accountability Leads to Double-Digit Growth

“Previously, the management team and some of the leadership team were spending several hours a month entering data. We’ve freed up that data entry time for more investigative work into why we’re not meeting targets and countermeasures... What really matters is that we’re talking about the right things much sooner.”

> Vice President of Technology

According to the President of Technology, the combination of the data integration capabilities and KPI Management has been a game changer for the firm. Managers and executives are no longer required to manually gather and enter numbers into spreadsheets and management systems. Rather, since KPI numbers update automatically, managers and executives have more time to focus on the reasons for misses and what to do about them. “On the KPI dashboard, you not only see your performance vis-à-vis

a target, but why you missed it and what’s being done to correct it... it also eliminates the need for executives to call managers to see what’s going on in a department or division. Everything they need is in the solution,” he said. “It really takes the ability to respond to issues along with transparency and accountability to another level.”

And the deeper insights and increased responsiveness having a real impact; after relatively flat revenue over several years, the firm saw double digit growth in 2017. The firm attributes the growth to a combination of process discipline and using the tool to facilitate discipline and faster responses to issues.

The Value of Global Visibility

Beyond managing KPIs and projects, to help keep consultants and other employees motivated, the firm also uses Dploy Solutions to share companywide performance information. “Every month we hold company ‘Town Hall’ meetings. We use Dploy Solutions dashboards to share company performance in our various lines of business,” the VP of Technology stated. “But anyone can also view the dashboards at any time to see how we are progressing, which is exciting for all of us as we are an ESOP company.” And as the firm rolls out use of Project Management for consulting engagements, it not only expects to further improve companywide performance, it also anticipates more satisfied customers and continued growth.

Dploy Solutions is a suite of technology solutions offered by TBM Consulting Group who brings 25+ years of experience with Operational Excellence and a proven track record building management systems that drive sustainable business performance. We offer implementation and consulting services to ensure a wide range of integration support, including management system design and implementation, data integration, setup and tracking hierarchy. Our goal is to provide the best customer experience possible. Learn more about TBM Consulting Group at tbmcg.com and Dploy Solutions at dplysolutions.com

