Tracking Utilization and Productivity of Teams

93%
Accurate Forecasting of Revenue

76%
Real-Time Tracking of Team Utilization

95%
Risk Mitigation

THE CLIENT

The client is a SaaS marketing platform company that empowers marketers to create lasting relationships and grow revenue. A trusted platform for thousands of CMOs and marketers, the client helps master digital marketing to engage customers and prospects.

THE CONTEXT

Grazitti Interactive and the client have been long-term partners. The client wanted Grazitti to automate their reporting in order to track the utilization of their customer success teams and consultants. They were using Clarizen - a cloud-based project management platform to measure the utilization of their teams, but wanted to delve deeper in order to accurately forecast and mitigate risk.
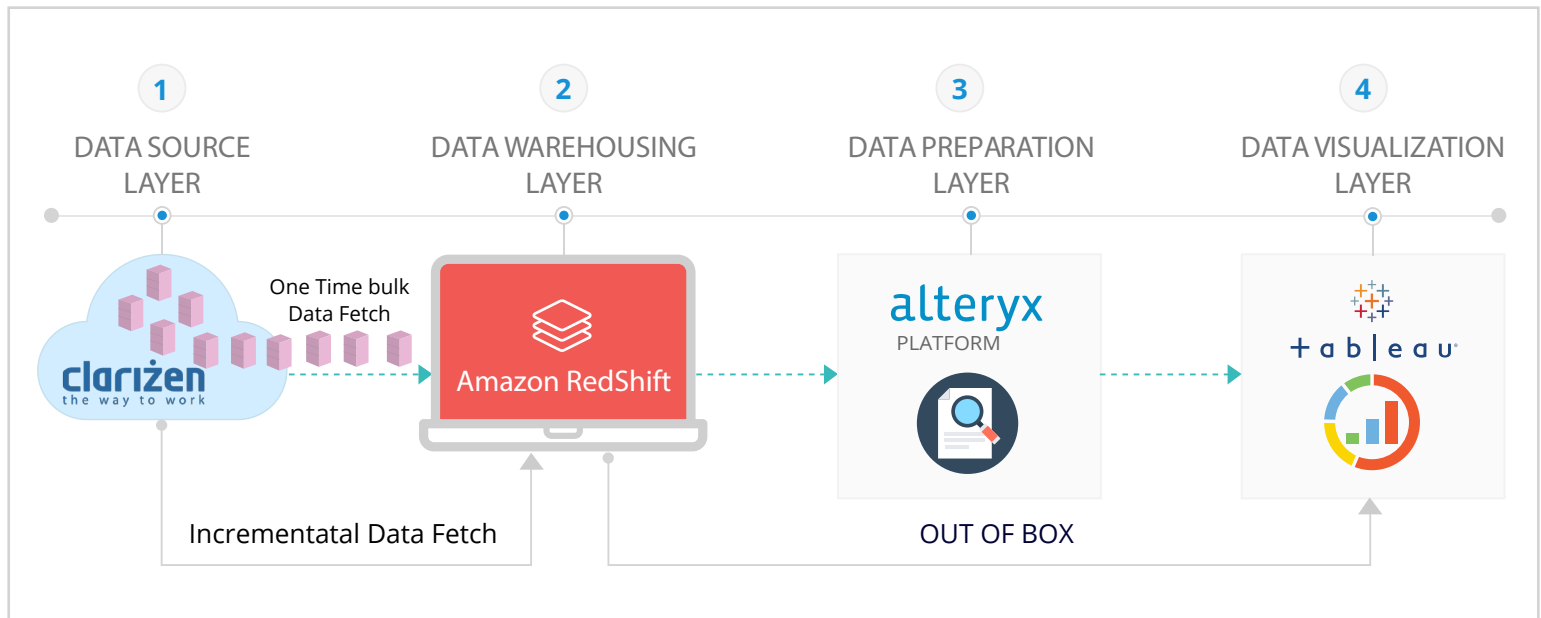
THE OBJECTIVES

The company was aiming to keep a close check on the status of projects, and also wanted to identify challenges and assess risks associated. The lack of visibility into current and forecasted utilization was another challenge that the company wanted solved. Along with this, the client did not have Role-based Access Control (RBAC), which required creating multiple reports according to roles.
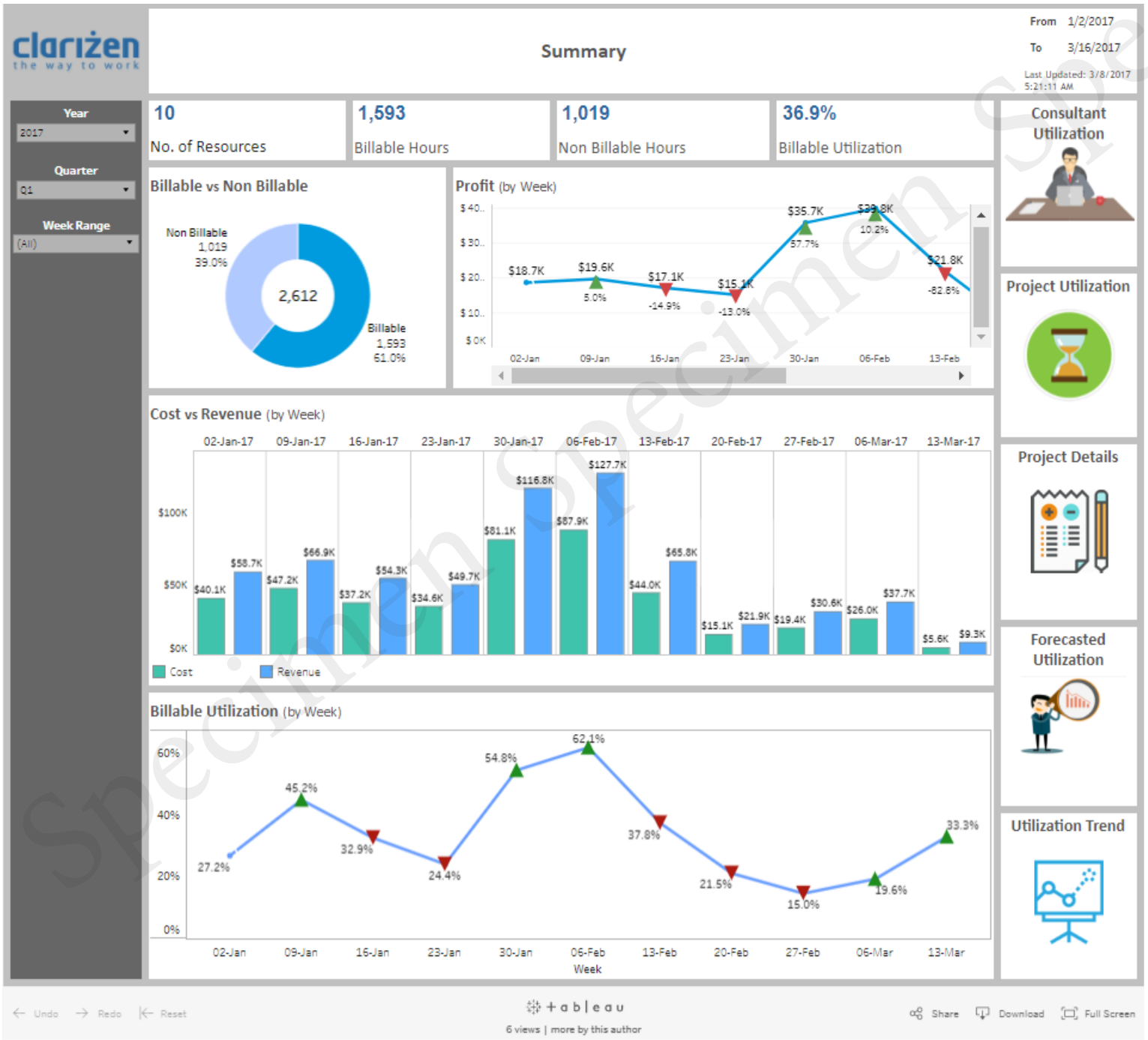
THE SOLUTION

- **Enabled Advanced Automated Reporting -** In order to mitigate the slow and manual error-prone reporting used by the client, Grazitti enabled advanced automated reporting which resulted in a whopping 93% boost in reporting efficiency.
- **Real-Time Reporting -** To gain visibility into current and forecasted utilization, our analysts enabled the client to run forecasts to dynamically update their consultants' monthly goals, which resulted in near real-time reporting leading to better utilization.
- **Enhanced Decision Making -** With no real-time information on projects' burn rate and revenue reports, our analysts empowered the client to track the burn rate with automated alerts for thresholds. The result was accurate reporting with regular email alerts that aided decision making.
- **Role-Based Access Control -** To keep financial data confidential, the client had to create multiple-role based reports for their consultants and managers. This led to reporting that was manual and error-prone. Through Tableau, we implemented Role-Based Access Control System. This allowed the client to create a single report with multiple access levels for consultants and managers.

SOLUTION ARCHITECTURE

Clarizen leverages Amazon Redshift as its database. With a one-time bulk transfer of data, and incremental data fetch thereon, we used Alteryx for data preparation and blending, and Tableau to create custom reports.

FINAL REPORTING

clarizen
the way to work

Summary

Year
2017

Quarter
Q1

Week Range
(All)

10	1,593	1,019	36.9%
No. of Resources	Billable Hours	Non Billable Hours	Billable Utilization

Consultant Utilization

Billable vs Non Billable

Non Billable
1,019
39.0%

2,612

Billable
1,593
61.0%

Profit (by Week)

$18.7K $19.6K 5.0% | $17.1K -14.9% | $15.1K -13.0% | $35.7K 57.7% | $39.8K 10.2% | $21.8K -82.6%

02-Jan 09-Jan 16-Jan 23-Jan 30-Jan 06-Feb 13-Feb

Project Utilization

Cost vs Revenue (by Week)

02-Jan-17 09-Jan-17 16-Jan-17 23-Jan-17 30-Jan-17 06-Feb-17 13-Feb-17 20-Feb-17 27-Feb-17 06-Mar-17 13-Mar-17

$40.1K $58.7K | $47.2K $66.9K | $37.2K $54.3K | $34.6K $49.7K | $81.1K $116.8K | $87.9K $127.7K | $44.0K $65.8K | $15.1K $21.9K | $19.4K $30.6K | $26.0K $37.7K | $5.6K $9.3K

■ Cost ■ Revenue

Project Details

Billable Utilization (by Week)

62.1%
54.8%
45.2%
37.8%
33.3%
32.9%
27.2%
24.4%
21.5%
19.6%
15.0%

02-Jan 09-Jan 16-Jan 23-Jan 30-Jan 06-Feb 13-Feb 20-Feb 27-Feb 06-Mar 13-Mar
Week

Forecasted Utilization

Utilization Trend

← Undo → Redo ⊬ Reset

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