SUCCESS STORY

AgilOne Improves Services Profit Margins by 25%

THE AGILONE STORY

Getting to Know Your Customer

AgilOne is the leading customer data platform for enterprise B2C companies. AgilOne's vision is to restore the personal relationships companies once had with customers before channel-specific marketing silos got in the way. AgilOne enables a single customer view through a best of breed identity resolution engine used on first party customer data. Machine learning and analytical algorithms enhance customer data and leveraged through real-time APIs and orchestrated across all touchpoints. AgilOne helps brands build authentic omni-channel customer relationships that maximize lifetime value. The AgilOne Customer Data Platform supports more than 150 brands worldwide including lululemon, Hugo Boss, Tumi, Joann, Schwan’s and Nine West.

INDUSTRY
Digital Marketing Technology

COMPANY
AgilOne

SIZE
51-100 Employees

WHAT MAVENLINK REPLACED
Spreadsheets, Homegrown Apps, Various Project Management Tools

BENEFITS
- Improved Services Profit Margins by 25%
- Increased Revenue
- Gained Visibility into Utilization
- Improved Project Costing
THE CHALLENGE

No Visibility Into Projects

Tom Kolich, Senior Director of Technical and Data Services at AgilOne, joined the team in August 2016, and immediately saw a technical gap when it came to services operations. At the time, the Professional Services team at AgilOne was using a number of home grown tools and spreadsheets to manage projects, assign resources, and keep track of financials in an inconsistent manner across the department.

According to Tom, “A huge issue was the lack of visibility into the status of a project or resource. We didn’t have a professional services automation solution that could track time or project status, so project management and profitability tracking was done in a very ad-hoc manner.” Tom was concerned that the team had little visibility over project financials, making it difficult to understand the true value of investments.

FROM THE SOURCE

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— Tom Kolich, Senior Director of Technical and Data Sciences Services, AgilOne

“...The custom reporting dashboards are the most helpful Mavenlink feature. We can run custom financial reports, project status reports, and compare project estimates to budgets. These reports help us with business development and in making better project costing decisions.”

— Tom Kolich, Senior Director of Technical and Data Sciences Services, AgilOne
The Switch To Mavenlink

The Search for a PSA Tool with Robust Collaboration & Reporting

According to Tom, “The tipping point happened when the board asked for a report on Services margins and it was difficult to answer.” The team looked at other solutions on the market, but ultimately chose Mavenlink due to the value it brings in threading all of the functionality of collaborative work management and PSA solutions in a single operational platform.

Revenue Recognition for Finance

Before Mavenlink, the finance team had no way of seeing Services revenue generated at the client level. The team struggled to accurately track percent of project completion and utilization rates, they needed a solution that would help them better understand the financial impact of their work.

Ease of Implementation

According to Tom, “We didn’t want something that required a lot of APIs, integrations, or custom coding by our team. We needed something that we could stand up quickly without a ton of legwork on our side.”

Salesforce Integration

AgilOne was using Salesforce and needed a solution that had an AppExchange integration, with little custom work required. According to Tom, “The Mavenlink Salesforce integration is fantastic; what comes out of the box is really valuable; and very easy to use.”

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The Results

**Improved Project Costing**

According to Tom, “We are now more predictable in our project delivery. That has helped us generate more revenue and drive the margins of the business. With a better handle on costs, we’ve been able to charge more, per project, with Mavenlink.”

**Increased Revenue**

With a greater understanding into the proper cost of projects, the team now works with a bigger budget, allowing for more work, and ultimately more revenue. According to Tom, “Mavenlink has definitely helped drive the profitability of the services team at AgilOne.”

**Increased Visibility into Utilization & Margins by 25%**

The AgilOne team experienced a dramatic improvement in utilization which led to a 25% increase in margins. Before Mavenlink, the team had little to no visibility into resource utilization or project margins. Mavenlink has increased visibility, allowing utilization rates and margins to rise.

—TOM KOLICH, SENIOR DIRECTOR OF TECHNICAL AND DATA SCIENCES SERVICES, AGILONE