



Quickbooks  
Integration  
Supports  
Financial  
Insights

THE COLLECTIVE INSIGHTS  
CONSULTING SUCCESS STORY



Accurate  
Resource and  
Operational  
Forecasting

# Collective Insights Consulting Builds Company on Mavenlink

## Consulting for a History of Success

Collective Insights Consulting is a consulting start-up formed by founders from eHire and Accenture as a management and technology consulting firm whose job is to get you where you're going.

Collective Insights Consulting is driven by its core values of clients, culture, and community. Collective Insights plots a course to move every client in the right direction. The business strives to be the partner that you actually enjoy sitting down with and works hard to cultivate a team of hard-working advisors who are experts in their field.

The Collective Insights team draws from deep experience to tailor a solution fully informed by each client's unique business goals. Once set, the firm works alongside each client to achieve these goals together.

Today, Collective Insights is driving success in organizational change management, workforce development, strategic communication, organizational design, instructional design and development, culture transformation, and more.



*Mavenlink's QuickBooks integration was a game changer. It gave us the opportunity to expedite and automate the invoicing and client billing process."*

Lindsey Brandon, People Operations Manager,  
Collective Insights Consulting

### INDUSTRY

Software

### COMPANY

Collective Insights Consulting

### WHAT MAVENLINK REPLACED

Legacy and Homegrown Systems  
and Spreadsheets

### BENEFITS

Master Planning supports  
resourcing decisions

Quickbooks integration supports  
financial insights

Mavenlink Insights enables  
accurate resource and  
operational forecasting

Support for rapid company  
growth and scaling

### THE CHALLENGE



## THE CHALLENGE

# Fast Growth Demands a Modern Solution

With the complexities that accompany a rapidly growing company and expanding team members' needs it quickly became clear that a more robust resource management solution was required to support the business.

Collective Insights began their search for a better software solution to meet several critical business needs, including:

### Consistent Company-wide Time Entry

As a growing company with team members devoted to a variety of projects serving many different clients, Collective Insights needed a time tracking solution that they could rely on. A solution that allowed for easy time entry and data that they could depend on would enable Collective Insights to have a better understanding of its performance.

### Critical Forecasting Capabilities

Collective Insights also needed dependable forecasting capabilities that provided crucial assistance in long-term planning. With the right solution, the firm would be able to gain insight into its recruiting needs, operational cost changes, and the balance between supply and demand that affects its daily operations.



*I live in Master Planning and there are a plethora of metrics that are stored in Mavenlink that we can pull from to support our business decisions."*

Lindsey Brandon, People Operations Manager, Collective Insights Consulting



THE SWITCH



# Building Success on Dependable Insights

The increasing need for a modern, more in-depth project and resource management solution led to Collective Insights' search for software. After reviewing the competition, the consulting firm chose Mavenlink for its ability to support the company's current needs and future growth.

Collective Insights' immediate needs included:

## Accurate Time Tracking

Collective Insights needed time tracking across the business, every resource tracking time to every project. Mavenlink's insights into utilization percentages was critical to see variability across all levels of the organization.

## Critical Quickbooks Integration

Mavenlink's integration with QuickBooks was a major selling point for Collective Insights' finance team. This integration made expediting and automating the client billing process possible.

## Detailed Planning Through Insights

Mavenlink Insights is used daily for understanding metrics around resource forecasting and financials across Collective Insights and plays a major role in the company's planning processes. Mavenlink provides the data needed for Collective Insights to understand recruiting needs, operational costs, financials, resource utilization, and more. With so many long-term projects, the business can now make strategic adjustments today and well into the future.



*When we chose Mavenlink, we knew that it could meet our needs now and in the future."*

Lindsey Brandon, People Operations Manager, Collective Insights Consulting



THE RESULTS





# Support for Company-Wide Success

## Companywide Support

Today, every employee at Collective Insights uses Mavenlink to track and submit their time. Project leads use the solution for time scheduling, understanding project financials, and resource availability. The Project Health Dashboard is used to analyze the financial health of each project and the leadership team uses Mavenlink Insights' reports for both portfolio-wide and project-specific insights.

## Greater Understanding Through Allocations

Mavenlink's ability to toggle views between weekly and longer term timelines was a benefit. Through the use of the Allocations tool, leadership can determine necessary team members prior to scheduling hours, extract data from projects easily, view individual resources to know which projects they are working on, and compare actual fees against the forecast and this has helped the company finetune its daily processes.

## Major Financial Insights

Now Collective Insights is able to create more detailed and predictable budget plans by forecasting out its expected revenue for the coming year and provide better project-specific budgets through the ability to accurately determine the revenue created by each project. Data is more accessible for estimating projects being sold or proposed to its potential clients and delivering what was promised on budget.

## Support for a Healthier Workforce

Collective Insights has been able to recruit and source the right resources to meet its needs. Combined with the ability to meet client demands both today and in the future, Collective Insights has continued to find dependable success with Mavenlink.



*Mavenlink and its reporting capabilities have had huge implications on managing our project lifecycles."*

Lindsey Brandon, People Operations Manager, Collective Insights Consulting