RPI Consultants Decreases Admin Time by 20% with Mavenlink

RPI Consultants provides expert software consulting and project leadership for enterprise level implementations of products and solutions.

RPI’s team of experts represents decades of professional services experience across diverse industries and functional areas. Each team member works with clients to identify cost-effective options through solution implementation, such as remote work that can minimize travel and downtime costs, cutting-edge technology to eliminate unnecessary administrative work, and the use of internal specialists who can more efficiently complete skill-specific tasks for greater success.

RPI prides itself on providing clients with the most value for its services and the company’s approach to software consulting delivers results on time, under budget, and right the first time.

“Partnership and trust are the linchpin to the RPI Experience. Mavenlink has given us the tools to deliver the RPI Experience to a growing list of clients and colleagues. It was easy to implement and we have a great team working to extend the solution to improve our business even more.”

Justin Braun, Partner, RPI
THE CHALLENGE

Finding Clarity in Project and Resource Management

RPI’s focus on providing high quality software consulting to clients means that the company is consistently providing a wide variety of services for many different organizations, each with their own unique needs. This drove RPI to use many different forms of communication with clients to drive projects forward, including document sharing, email, invoices, automatic processing, and more.

As a result, RPI adopted numerous solutions to aid in task management duties spread across a growing team, with the business using Smartsheet for project management, ClickTime for time entry, and Zoho for reporting.

However, these many disparate systems created an increasing number of complications that RPI needed to solve in order to stay successful. These included:

Manual Data Entry and Integration
Having project management, time entry, and project reporting managed in separate solutions meant that pulling data needed to be done manually. In addition, the process behind logging time and forecasting became time consuming for each team member.

Lack of Transparency and Synchronization
RPI also experienced issues with transparency into resource activity and project progress, with managers unable to tell what projects each team member was working on. The organization experienced difficulty aligning project data with project plans and the onboarding process for new hires became complicated due to the complex processes being used.

“Having a solution in place that could synchronize our processes was critical to us,” said Julia Robinson, Sr. Project Manager at RPI.

“

We’re big data nerds here, so the ability for anyone, leadership, managers, whatever your role is, to see data the same way is amazing. We’ve not only used the out-of-the-box reporting, but have created a lot of custom reports. It’s all coming from the same data pool, which makes it dependable.”

Julia Robinson, Sr. Project Manager, RPI

THE SWITCH

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Julia Robinson, Sr. Project Manager, RPI
Becoming Equipped for Even Greater Success

As RPI continued to find new levels of success in the consulting field, the company decided the time had come for a project management solution that would help them move past their limitations. The search for a solution that could replace legacy systems while also integrating and synchronizing data from other solutions led RPI to Mavenlink.

RPI was specifically looking to Mavenlink for the following:

**Consolidated Project Data**  
Project data was spread across multiple systems and made it difficult for RPI to measure current performance or understand the company’s potential for growth. Mavenlink was able to consolidate project data and make it available in out-of-the-box and custom dashboards.

**Easy Collaboration**  
Collaboration was complicated with tasks and analytics spread across multiple systems. Mavenlink’s intuitive user interface and the ability to share, update, and communicate through individual tasks and larger projects helped RPI achieve the connectivity teams needed.

**Greater Control Over Finances and Time Tracking**  
The ability to enter and apply time to projects in a central system was crucial to RPI success. Mavenlink combined time tracking with integration to RPI’s financial management system to help RPI better understand resource allocation, project budget spend, and provide insights into their financial performance for better margins.

“Being able to cross-reference time entries, project budget, and scheduled/budgeted time for each resource in one place has been so helpful. It saves a lot of time because it is no longer a manual task. It allows us to see in real-time exactly where the project stands.”

Crystal Dicken, Project Coordinator, RPI
**Strengthening Strategy for Continued Success**

**Streamlined Administrative Duties**
Mavenlink has provided the RPI team with more visibility into forecasts and tasks. Managers can now view schedules, time entries, and expenses, which can be logged directly to their related tasks, as well as project lead and lag indicators. Increased visibility and insights have improved resource scheduling and decreased admin time by 20% for RPI.

**Strengthening Utilization and Forecasting**
Utilization rates are RPI’s leading metric to better understand and improve project performance. Mavenlink forecasting has provided the insights for RPI to determine future skill set needs, dedicate more time to client-facing strategies, and reduce time spent on internal tasks leading to more efficient resource management and a 5% increase in utilization rates.

**Improving the Sales Process**
Mavenlink’s integration capabilities have connected the RPI pipeline with task creation enabling a smooth transition into creating statements of work, reviewing hours assigned to a prospective project, and using Mavenlink Master Planning for allocations. These processes provide a view into RPI’s project pipeline to ensure clients are given more accurate estimated timelines for new projects.

**Gaining Critical Insights with Dashboards**
Today, RPI uses a variety of out-of-the-box and custom built dashboards in Mavenlink and Insights to access crucial insights needed for success. Project Detail and Project Health for Project Managers ensure project information is consistently and completely entered and project health alerts provide data needed for informed decisions. The Portfolio Scoreboard helps RPI identify any at-risk projects or projects with timelines in jeopardy to make adjustments as needed. The Project Detail Burndown report highlights what is needed to successfully finish a project. Together, these insights and more help RPI make important decisions in hiring, project strategies, and more to ensure long-term success.

“The benefits were present on day one, and continue to grow over time as we’ve learned to better utilize the system. Mavenlink has allowed us the opportunity to breathe in a time of both uncertainty and opportunity. We are lightyears ahead of where we were just a short six months ago.”

Stephanie Kowal, PMO Director, RPI

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