

Autotask Smart Step Testimonial

Background:

Bedroc is a specialized technology services provider, focused on companies headquartered in the Nashville, TN metro area. We operate in 6 areas of practice: Network Architecture, Secure Enterprise, Datacenter, Cloud & Managed Services, Project Management, and Unified Communications. Bedroc has traditionally offered professional services on a per project basis, with little to no managed services customers.

Since the company's inception in 2009, Bedroc has averaged 20% growth, year over year. Annual sales eclipsed \$35M for 2015.

Testimonial:

Bedroc's growth in its short history, dictated that we employ a tool to help us automate and track service requests and revenue across the company. In 2013, Bedroc invested in AutoTask as our tool of choice. Implementation went well, but as our company continued to grow, we pushed the threshold of what is required from the tool to support our operations. We have begun to embrace a metrics-driven, or evidence-based decision making process, that matches the growing complexity of our organization. As a result, I reached out to AutoTask to help us in three key areas:

- Clean up and simplification of our AutoTask configuration
- Understanding of AutoTask reporting and its capabilities
- Automating the generation of decision making reports

Our Account Manager, Jim Frederick, pointed us to Katee Cufari and the SmartStep program as the way to engage the consulting that we needed to bridge the gap between implementing and maturing our implementation. On their recommendation, we engaged with Michelle Bournstein for consulting to help our organization move forward with our goals.

Michelle helped us organize and re-evaluate our environment: She dug into our system, even before arriving onsite, arriving onsite prepared to help us streamline our setup. Based on our dialog together, early in the consulting, Michelle helped us reorganize our resources, company setup, and customizations to simplify reporting for each of our practices.

Together with Michelle, we were able to gain understanding about AutoTask reporting that drove productivity. For example, working through the calculations of practice and engineering revenue for compensation purposes, used to be a manual process that took several days. We have simplified the process, through the generation of automated reporting, to a matter of hours. Another area of focus for us was understanding our commitments to customers, and making sure that we know where all of our resources are deployed. Our projects can last several months, with several stops and starts along the way. Michelle helped us generate a report and organize our resources, so that we know where all of our resources are deployed today, and where they will be deployed in the future.

Finally, being able to consolidate all of the information gathered about individual projects into an overview for decision making was a critical element for which we engaged consulting. I wanted to be able to generate a report that told us what types of projects or roles were under, or over-quoted. Of paramount concern, was identifying trends where our estimating was deficient in predicting the effort required for projects. With a simple report, I can now identify where we have “leaks” in revenue, and enact change to “plug” them. Our time with Michelle, in understanding the system and how to use it to its fullest potential, was the catalyst for positive change in our organization.

In the period of a few short days, Michelle was able to help us take our ideas for improvement in Operations and make them actionable. While the time allowed in the original engagement would not allow us to accomplish all of our goals, the foundation has been laid for future success. We very pleased with Michelle’s knowledge of the system, attention to detail, and willingness to listen and understand our goals; we have signed on to continue our relationship in the future.

Geoff Graves

Director of Project Management, Bedroc