

## Portfolio: Account Overview

**Initial Engagement Value:** €131,860 (4-Year Upfront Agreement for 80 Users)

**Future Growth Opportunity:** Transition into a 5-year strategic partnership.

**ROI Achieved:** Within 8 months, aligning with the client's long-term growth plan.

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## Strategic Approach

- Conducted a **MEDDPICC analysis** to align with stakeholder goals, identify decision-makers, and uncover potential blockers.
  - Addressed key challenges: **Siloed workflows**, lack of **centralized project communication**, inefficient **task creation/editing**, and the need for actionable **profitability insights**.
  - Transitioned the sales process into a **consultative learning approach**, allowing the client to experience the platform firsthand.
  - Designed and implemented a **30-day learning project** tailored to each user, enabling hands-on training and seamless adoption.
  - Highlighted advanced features available on the Scale plan to demonstrate alignment with their long-term goals.
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## Client Objectives

- **Unified Collaboration:** Centralize project communication across multiple locations (Boston, Charlotte, Portsmouth, San Francisco).
  - **Streamlined Task Management:** Simplify project and task workflows with file attachments and editing capabilities.
  - **Profitability Tracking:** Provide insights into project budgets, time tracking, and resource utilization.
  - **Advanced Reporting:** Deliver custom and scheduled reports for actionable decision-making.
  - **Scalable Growth:** Ensure the platform supports their expanding operations and strategic goals.
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## Key Features Delivered

- **Learning Projects:**
  - Created tailored 30-day learning projects for all 80 users, showcasing real workflows and system functionality.
  - Provided hands-on training to ensure immediate value and user confidence.
- **Advanced Features (Scale Plan):**

- **Budgeting Iteration 2:** Advanced resource and cost management tools.
  - **Custom and Scheduled Reports:** Enabled insights into profitability, utilization, and project health.
  - **Proposals Module:** Streamlined proposal creation, critical for their client acquisition strategy.
  - **Retainer Model Focus:** Simplified recurring billing workflows.
  - **Advanced Timesheets:** Detailed time tracking with planned vs. actual insights.
  - **Resource Forecasting:** Provided visibility into team capacity and workload projections.
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## Teams and User Allocation

- **Initial Deployment:**
    - **Web Design:** 20 Users
    - **Branding:** 25 Users
    - **Digital Marketing:** 25 Users
    - **Project Management and Admin:** 10 Users
  - **Multi-Location Implementation:**
    - Locations: Boston, Charlotte, Portsmouth, San Francisco
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## Challenges Addressed

1. **Siloed Workflows:** Unified project discussions, updates, and task management into a single platform.
  2. **Inefficient Task Management:** Streamlined task creation, editing, and collaboration with file attachments.
  3. **Limited Reporting:** Delivered advanced reporting tools for profitability, utilization, and project health.
  4. **Scaling Challenges:** Implemented tools to support the client's multi-location growth and 5-year plan.
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## Results and Impact

- **ROI Achieved in 8 Months:** Demonstrated value through streamlined workflows, profitability tracking, and reduced silos.
- **Upfront 4-Year Agreement:** Secured a €131,860 deal after a 3-month sales cycle driven by consultative learning and feature showcasing.
- **Client Confidence:** Transitioned into a trusted partnership, with the client emphasizing their belief in Teamwork's value.
- **Team Adoption:** All 80 users actively engaged, leveraging the platform to improve collaboration and efficiency.

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## Future Growth Opportunities

- **5-Year Strategic Partnership:** Aligning with the client's long-term vision for scalability and profitability.
  - **Advanced Feature Rollout:** Expanding adoption of profitability analysis, resource forecasting, and advanced timesheets.
  - **Client Expansion:** Supporting additional growth through streamlined processes and centralized workflows.
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## Phase-Based Implementation

### Phase 1 (0–3 Months):

- Conducted MEDDPICC analysis to align expectations and identify success criteria.
- Designed and implemented 30-day learning projects for user adoption.
- Delivered initial training sessions to establish workflow efficiency.

### Phase 2 (4–12 Months):

- Focused on advanced features, including budgeting, profitability tracking, and resource forecasting.
- Centralized communication and task workflows across all locations.

### Phase 3 (Year 2–4):

- Supported scalability with advanced tools and reporting capabilities.
- Positioned the platform for long-term success and further expansion into a 5-year plan.