

## Portfolio: Account Overview

**Initial Engagement Value: €10,000 (12-Month Deal)**

**Upsell Opportunity:** Additional 70 licenses purchased in Month 10 (€40,000).

**Current Contract Value:** €50,000 (2-Year Upfront Deal).

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## Strategic Approach

- Conducted a **MEDDPICC analysis** to align with stakeholder goals and uncover growth opportunities.
  - Focused on delivering ROI within the first 6 months through task management and resource optimization.
  - Positioned Teamwork as the scalable solution, driving the upsell to 70 additional licenses in Month 10.
  - Transitioned the account into a **2-Year Upfront Deal** upon successful ROI delivery and team adoption.
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## Client Objectives

- **Unified Task Management:** Streamline project and task workflows across teams.
  - **Scalable Growth:** Build a framework to support current needs and future expansions.
  - **Automation:** Reduce manual effort through automated workflows and recurring tasks.
  - **Insightful Reporting:** Enable detailed workload, time, and milestone tracking.
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## Key Features Delivered

- **Task and Project Management:**
  - Task list templates with dependencies for recurring workflows.
  - Sprint/Kanban boards for agile project cycles.
- **Time Tracking and Reporting:**
  - Time tracking by task, user, and project with Planned vs. Actual comparisons.
  - Custom reporting for milestones such as VAT declarations, monthly closings, and project health.
- **Automation and Integrations:**
  - Automated task creation based on onboarding forms.
  - Integrated with XRM for billing, CRM Dynamics for customer data, and Power BI for advanced reporting.
- **Scalable Collaboration:**

- Guest access for client collaboration with task visibility and updates.
  - Features to onboard new users seamlessly as teams expanded.
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## Teams and User Allocation

- **Initial Deployment:**
    - Development Team: 7 Users
    - Onboarding Team: 6 Users
    - Controlling Team: 6 Users
  - **Upsell Expansion:**
    - Added 70 licenses for additional users across development, onboarding, and controlling teams.
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## Challenges Addressed

1. **Fragmented Systems:** Consolidated workflows into a single platform, reducing inefficiencies.
  2. **Limited Reporting:** Enabled advanced reporting for workload, task completion, and project health.
  3. **Manual Workflows:** Automated task management and recurring workflows to save time.
  4. **Disconnected Systems:** Integrated XRM, CRM Dynamics, and Power BI for seamless operations.
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## Results and Impact

- **Initial Success (12-Month Period):**
    - Demonstrated ROI within 6 months through task management and efficiency gains.
    - Delivered actionable insights via custom reporting, improving decision-making.
  - **Upsell Conversion (Month 10):**
    - Added 70 licenses worth €40,000 by showcasing scalability and sustained ROI.
    - Successfully transitioned to a 2-Year Upfront Deal, solidifying the partnership.
  - **Team Adoption:**
    - Trained and onboarded users in phases, ensuring high engagement and readiness for expansion.
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## Future Growth Opportunities

- **Sister Company Integration:** Plan to onboard the sister company in the same region within the 2-year period.
  - **Scalable Features:** Expand use of advanced tools like utilization tracking and profitability analysis.
  - **Multi-Year Commitment:** Leverage the success of the 2-year deal to transition into a 60-month partnership.
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## **Phase-Based Implementation**

### **Phase 1 (0–6 Months):**

- Create templates for task and project management.
- Train teams on recurring workflows, task assignments, and reporting.

### **Phase 2 (6–12 Months):**

- Focus on automation and client communication.
- Prepare for expansion with additional licenses.

### **Phase 3 (Post-Upsell, 2-Year Deal):**

- Scale operations to include the sister company.
- Drive adoption of advanced features and monitor long-term ROI.