

Portfolio: Account Overview

Initial Engagement Value: €90,000 (3-Year Deal)

Current Contract Expansion: White-labeling services to manage 20 client accounts, becoming a Certified Partner.

Future Potential: Expansion into additional client accounts and further scaling of partnership.

Strategic Approach

- Conducted a **MEDDPICC analysis** to align with client's unique needs, focusing on value-driven outcomes and client satisfaction.
 - Delivered ROI within 6 months by enabling team adoption, tool consolidation, and efficient task management.
 - Transitioned client into a Certified Partner, white-labeling Teamwork for their 20 client accounts, with a framework to expand further.
 - Implemented key integrations (Toggl Track, Google Drive, Xero) and structured phased adoption to ensure smooth scaling.
-

Client Objectives

- **Team Adoption:** Ensure all team members use and value the platform, reducing reliance on multiple tools (e.g., Monday.com, Toggl, Trello).
 - **Consolidated Workflow:** Establish a central calendar view for all team members and projects.
 - **Enhanced Planning:** Simplify scheduling and capacity planning for the agency.
 - **Intuitive Time Tracking:** Provide tools for accurate and easy logging of time, comparable to Toggl Track.
 - **Profitability Insight:** Generate reports on project profitability, billable vs. non-billable work, and utilization.
-

Key Features Delivered

- **Task and Project Management:**
 - Introduced task templates and workflows to standardize project phases (Setup, Discovery, Design, Delivery, Closure).
 - Implemented dependencies and milestone tracking for consistency across diverse services (web, design, film, software).
- **Time Tracking and Reporting:**
 - Enabled intuitive time tracking with Planned vs. Actual insights.

- Delivered reports for Directors, Team Leads, and PMs to monitor backlog tasks, capacity, and profitability.
 - **White-Labeling Features:**
 - Configured Teamwork to serve as a white-label solution for 20 client accounts, allowing client to manage their clients' tasks efficiently.
 - **Integration and Automation:**
 - Integrated Toggl Track for seamless migration, Google Drive for resource storage, and Xero for invoicing.
 - Automated onboarding workflows to create projects and tasks from form submissions.
-

Teams and User Allocation

- **Initial Deployment:**
 - **Design:** 15 Users
 - **Web:** 9 User
 - **Team Leads:** 7 Users
 - **Film:** 9 Users
 - **Ops:** 4 Users
 - **Software:** 10 Users
 - **White-Label Expansion:**
 - 20 client accounts managed under white-label solutions, supported by a scalable project and task management framework.
-

Challenges Addressed

1. **Fragmented Tools:** Consolidated workflows from Monday.com, Toggl, Trello, and others into a single platform.
 2. **Limited Planning Insight:** Delivered tools for calendar views, backlog management, and capacity planning.
 3. **Adoption Barriers:** Focused on team onboarding and value-driven outcomes to enhance tool appreciation and usage.
 4. **Lack of Profitability Reporting:** Enabled project profitability and utilization reporting for Directors and Team Leads.
-

Results and Impact

- **ROI Achieved in 6 Months:** Replaced multiple tools, optimized workflows, and demonstrated immediate value.
- **Certified Partner Transition:** Client became a Certified Partner, leveraging Teamwork as a white-label solution for 20 client accounts.

- **Profitability Growth:** Client recouping their investment by managing clients' projects effectively, showcasing efficiency gains and scalability.
 - **Team Adoption:** All team members onboarded and actively using the tool, driving consistent processes across departments.
-

Future Growth Opportunities

- **Client Expansion:** Potential to scale white-label services to additional client accounts, increasing revenue and platform utilization.
 - **Advanced Features:** Introduce profitability analysis and advanced automation features to further streamline operations.
 - **Long-Term Commitment:** Position client for multi-year collaboration, supporting their growth and client service delivery.
-

Phase-Based Implementation

Phase 1 (0–6 Months):

- Migrated workflows from multiple tools into Teamwork.
- Onboarded users with task and project management templates.
- Delivered ROI by optimizing time tracking and reporting.

Phase 2 (6–12 Months):

- Focused on profitability reporting, utilization tracking, and advanced integrations.
- Enabled white-labeling for 20 client accounts.

Phase 3 (Year 2–3):

- Expanded client management and task workflows through scalable solutions.
- Leveraged partnership status for further growth and collaboration opportunities.