COVARIO SUCCESSFULLY MANAGES 36,000 WORK REQUESTS PER YEAR WITH SUPPORT FROM WORKFRONT

Agency work is fast-paced, doubly so when the firm is also a leading software provider. Two hundred Covario team members seamlessly work together to support 700 client projects a year. Yet easily orchestrating on-time and on-budget programs isn't always easy.

COVARIO

Covario

Digital Marketing Services and Software Solutions

www.covario.com

San Diego, CA

Without an automation resource to help increase work and resource visibility, employees and managers can find it difficult to know who is working on which requests and how much time each project or task will take to complete. Using Workfront, Covario now tracks deliverables and ensures the best use of team resources for its dynamic agency services and software solutions.

Covario is a leading independent search/content marketing agency and SEO/social media software provider. The firm was selected by OMMA magazine as the Search Agency of the Year a record three years in a row from 2011 to 2013. Headquartered in San Diego with offices in Chicago, Seattle and London, the firm's customers include global leaders in technology, consumer electronics, financial services, retail, ecommerce, media, entertainment, publishing, and consumer packaged goods.

AT A GLANCE

CHALLENGES

- Ineffective request management
- Inefficient onboarding process
- Incomplete time-tracking
- Lack of resource management

BENEFITS

- Simpler request management for 700 projects per year
- More efficient work delivery
- Accurate time tracking
- Prioritized resource management
- Increased confidence
- Competitive

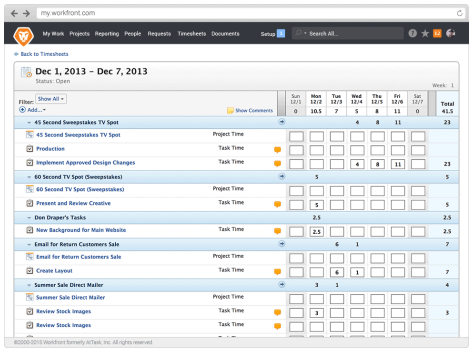
THE CHALLENGE
Lack of Adequate Project Visibility

Covario has a passion for delivering measurable results and great solutions. Yet internal manual processes were interrupting its employees' ability to effectively meet client needs. Going back a few years, the firm also lacked an established project management office (PMO) to recommend the right technology tools to support project management and delivery teams.

"The biggest challenge was having information in different places," explains Max Cheprasov, who now serves as vice president of the PMO and of operations at Covario. "One person spent 20 hours a week collecting information and putting it in an Excel file to distribute to executives. As the firm grew, it was becoming increasingly difficult to make quick decisions when we had conversations about incremental projects and additional work."

Without a consistent way to capture requests or collaborate, the firm experienced significant challenges:

- **REQUEST MANAGEMENT** – Staff members attempted to keep up with the growing number of client requests manually in notebooks, emails, instant messages, and disparate applications—from Microsoft Excel to Basecamp to Google Docs.



WORKFRONT AND TIME TRACKING

Workfront takes the headache out of timesheets, provides real-time project completion information, and keeps costs up-to-date.

"Last year, we executed about 700 different projects for about 80 clients. We received about 36,000 work requests—so about 28,000 tasks and 8,000 issues and work requests were processed using Workfront. Having visibility into those work requests in one organized manner and one single tool like Workfront is invaluable. We can have real-time visibility into it at any time and anywhere. At the end of the day, Workfront helps us complete our work better, faster and more efficiently for our clients."

MAX CHEPRASOV
VP, PMO & Operations, **Covario**

- **ONBOARDING PROCESSES** – When a new hire joined—or someone transferred between teams—that person had to be introduced to a variety of different tools and learn where to go to find the information he or she needed, which was not an efficient use of time.
- **TIME TRACKING** – Previously, a quarter of the employees used a time-tracking tool called Toggl, yet the tool didn't attribute time to a specific project. Other employees logged minutes or hours in spreadsheets. Different approaches made it difficult to realize how much time was being spent on a given contract. "Tracking time was something that you dreaded every single day – or if you waited until the last minute, every week," recalls Jessica Berg, associate director for paid media at Covario.
- **RESOURCE MANAGEMENT** – Anecdotally, team members knew who was busy and who was not. However, there was no accurate visibility into how over- or underutilized people were on a regular basis. "When we first started, we were delivering as much as we could, as fast as we could. In some cases that led to burnout," remembers Kate Cheeseman, senior account director at Covario. "We could only report anecdotally."

THE WORKFRONT SOLUTION
All Work In One Place

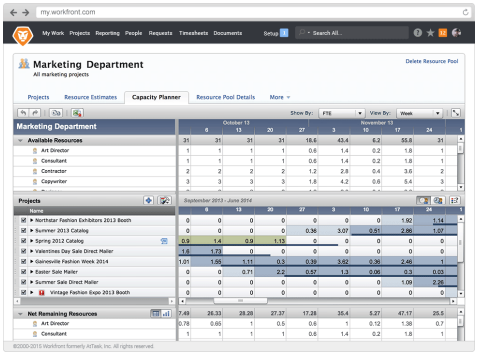
Covario chose Workfront to help the firm better control projects, while managing its portfolio, programs, people, and documents all in one central place. "You can communicate and collaborate in one place. It's very social and it continues to evolve," explains Cheprasov.

- **CUSTOMIZED WORKFLOWS FOR EACH DEPARTMENT**
  The team at Covario was also impressed that Workfront could be customized to fit their needs. The Workfront implementation at Covario—which included development, design, implementation and deployment—took only two weeks and involved Workfront consultants and 12 Covario project team leads, each representing a department.

"Everybody contributed ideas, thoughts, and questions, and we built a tool that really works for every single individual in the company," says Cheprasov. "We built custom dashboards, custom reports, custom layout interfaces so when people come in, they actually see the information they need to see—it's different for every department, every resource and every client." After deployment, it took another two months for team members to get used to the web-based solution and to make sure that all of the information had been transferred and could be quickly found in Workfront.

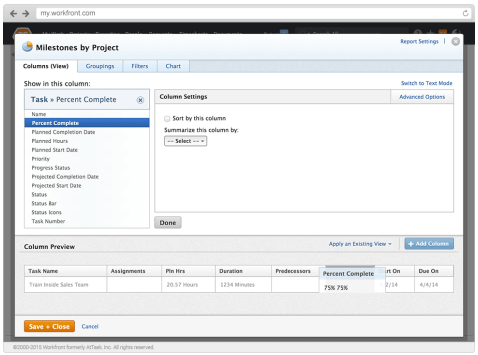
Initially, 10 to 15 users across different departments with three different project managers were using Workfront for one large client engagement. "Then people heard about the tool and they were interested in getting the same project management platform," according to Cheprasov. "We rolled it out to two more client accounts and added about 50 additional users. From there, we decided we needed to expand this to everybody in the company."

- **STREAMLINED PROCESSES TO MEET AGGRESSIVE PROJECT GOALS**
  Since rolling out Workfront company-wide, Covario has been able to meet some of the aggressive goals—meeting at least 90% of projects on time—it had set when it established its PMO. "Every six months, we all agree that we're doing a



WORKFRONT AND PLANNING FOR CAPACITY

Workfront provides full visibility into all the work your team members are doing and tells you, according to their total amount of working hours, exactly how allocated each person is. This helps you maintain balanced workloads and expec-



WORKFRONT AND REPORTS

Rich reports and informative dashboards track all your vital metrics in one place and give you complete visibility and transparency into every aspect of your team's work.

really good job because we're delivering on time," says Cheprasov. "We have to continue raising the bar because we want to continue doing more, and do better for our clients. We moved it to 95%. We're at 98% now. I don't know if we can go above 100%, but we're getting pretty close."

- **MORE EFFECTIVE PROJECT DELIVERY AND RESOURCING**
  Today, Covario project management is streamlined. Because the cloud-based solution is integrated into all Covario processes, it helps ensure that Covario is getting projects out on time, delivering high-quality work and using resources most effectively. Insights from Workfront about past project performance help team members understand exactly how to deliver on a great vision. Team members can confidently go into a client or to a prospect and know fully that the firm can deliver a project, and deliver it on time.

> *"We can now easily see during the course of a relationship if we're under-delivering on a contract or if we're delivering too much and getting out of scope...Workfront has helped improve the client relationship in terms of profitability and on-time delivery."*
>
> **MAX CHEPRASOV**
>
> VP, PMO & Operations
> **Covario**

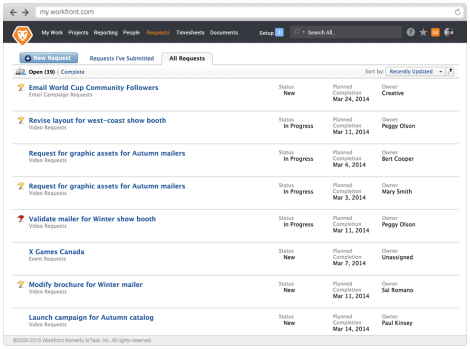
Workfront has also created a medium for Covario to communicate with clients more effectively. Clients can login to see how their projects are progressing and how much budget has been spent. This clarity makes it easy for Covario account managers to prioritize projects and communicate the need for clients to adjust their budgets, if necessary.

BENEFITS
Increased Visibility and Revenue Growth

The Workfront solution has contributed to Covario's already high level of customer satisfaction, putting greater team focus on campaign success, productivity, and ROI. More staff hours—previously spent updating status reports, sifting through email chains, and combing through spreadsheets—are focused on client work and building strong client relationships. The results of which were reflected in the firm's high Net Promoter Scores.

Covario has increased visibility and improved critical delivery processes:

- **SIMPLER REQUEST MANAGEMENT** – Workfront allowed Covario to retire 15 different tools—Outlook tasks, Zendesk, Rally, Excel, Microsoft Project, Basecamp, JIRA and others—to manage personal tasks, project status, and ad hoc requests. Now any time team members have a question about a project or task, or are looking for an update, they go to one place because all software solutions used for issues and requests are enabled in Workfront, using Help Desk.



WORKFRONT REQUEST MANAGEMENT

Workfront standardizes the request process and provides a single location for viewing both requests you've made and requests that come to you.

> *"Workfront gives us, as an independent and fast-growing firm, a competitive advantage over other agencies...We have the project management templates built out for every type of project. We have workflows established. We have best practices. We have the process outlined, and all of that is tracked. That's why we got that NetPromoter score."*

MAX CHEPRASOV

VP, PMO & Operations
Covario

- **MORE EFFICIENT DELIVERY** – Workfront has provided structure and streamlined processes. The solution makes sure everyone is on task and that projects are being completed. It provides a snapshot so managers can prioritize, as needed.
- **EASY AND ACCURATE TIME TRACKING** – Covario trained its entire company to use Workfront. Virtually everyone knows how to use time sheets. They know exactly where and how to enter their time, and management knows that the data is accurate.
- **PRIORITIZED RESOURCE MANAGEMENT** – Rather than having to figure out what projects team members have to do, Workfront helps them prioritize their week or day in half the time. Employees can now optimize program management and increase cost efficiency.

Workfront has also delivered non-tangible benefits to the company and its employees:

ABOUT WORKFRONT

Workfront is a cloud-based Enterprise Work Management solution that helps marketing, IT, and other enterprise teams conquer the chaos of excessive email, redundant status meetings, and disconnected tools. Unlike other tools, Workfront Enterprise Work Cloud is a centralized, easy-to-adopt solution for managing and collaborating on all types of work through the entire work lifecycle, which improves team productivity and executive visibility. Workfront is trusted by thousands of global enterprises, like Cars.com, Cisco Systems, Covario, National Geographic, Schneider Electric and Trek.

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