



SAVE TIME. AVOID MISTAKES. MANAGE WISELY.

The Company

UniFund, a New Hampshire-based software development company.

The Problem

Needed a tool to manage human resources in the field and extend visibility into client ecosystem

The Solution

Implement a management tool to improve resource utilization, streamline project management, and defeat internal silos bogging down interdepartmental communications

Result

Projects are coordinated throughout the company, utilization rates rose by more than 15%, and UniFund met its SLAs on budget 90% of the time while realizing a labor savings of nearly \$18,000.

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Sean Marlow, director of field services, UniFund

SILOS LIMIT SUPPORT, GROWTH

A few years ago, UniFund, a software development company that specializes in accounting, payroll, and HR management software solutions used in the education, municipal and local government verticals, was running its business using an ad-hoc combination of disparate systems, including Excel and a homegrown service desk system. A complete picture of any given client or prospect in the sales pipeline meant cobbling together information from several departments that had no formal system for communicating with one another. The ISV realized it needed a solution that merged CRM, lead generation, prospect nurturing and internal workflow processes together into a central repository.

“We started our search because I needed a better tool to manage our human resources in the field,” says Sean Marlow, director of field services operations for UniFund. “That was the initial pain point — better scheduling and more visibility into the workload assigned to each person. But, as we started digging into it, we realized our needs extended well beyond that.” UniFund quickly realized that with the right tool, it could coordinate field resources, integrate billing, refine customer support and align efforts between support and development.”

EMPOWER COMMUNICATION, EFFICIENCY

To find that solution, Marlow researched a number of options. While several well-known solutions, such as Tenrox and AtTask, handled project management, they lacked the encompassing business workflow and communication support that UniFund desired. “When we saw Autotask, it dawned on us that we needed a system to manage our entire business, not just a project planning tool.”

After a single demo, Marlow was sold. With support from Autotask professional services, UniFund migrated to the tool in a month. “Almost immediately, we realized we’d never have another silo within our company in terms of information,” says Marlow of the implementation in 2009. “Today, it has changed our operations significantly.”





NO MORE SILOS

With Autotask in place, UniFund enjoys clear visibility into its clients, customer proposals, and the actions of each department. For example, Marlow plans resource utilization for the professional services team using detailed — and real-time — sales data that allows him to prioritize projects in the pipeline. UniFund has also seen improvement to its customer satisfaction levels, with responsive service enabled internally because each UniFund team member has historic and current information on any given customer at their fingertips.

“Because we spend less time looking for meaningful and timely information, we spend more time on productive activities,” explains Marlow. Plus, due to integration between departments, UniFund has increased upsells. “Add-on business represents about 35% of the software and professional services business we now deliver compared to 15% pre-Autotask,” he adds.

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“Profitability has also improved because of the visibility Autotask provides into the labor required for UniFund implementations. “We’ve also been able to better defend the value of the investment a client has to make with us because we can back it up with hard data,” says Marlow. “Our competitors can’t boast the same level of efficiency, transparency, and service that we offer to our clients.” That efficiency stretches from tracking leads in the sales pipeline right down to invoicing. In fact, the software company has reduced its billing time by more than 50% after eliminating manual creation of invoices.

“All our billable items are on one single screen whereas we used to manually verify every single line item on a database report to determine which were ready to bill. All of those tasks are automated in Autotask now,” explains Marlow.

UniFund implemented Autotask just prior to the economic downturn, and Marlow feels strongly that the tool enabled the ISV to weather that storm. For example, the UniFund support team hit its SLA targets 90% of the time during a period when demand on the ISV’s support resources was the highest and resources were at their thinnest. The software developer has also increased its average utilization rate by more than 15%.

“We simply couldn’t have done that in our previous operating environment,” says Marlow, who estimates that the UniFund support team alone has recovered two to four hours per day by utilizing Autotask, representing about \$18,000 in labor savings annually. “Ultimately, Autotask has truly enabled us to **Save time. Avoid mistakes. Manage Wisely.**”



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