



IDBS LTD.

“We needed a professional services automation system that would consolidate our databases, improve our billing and expense processes, and that would be an essential platform for moving us forward for the next five years. That’s why we chose Tenrox.”

David Winter, Senior Project Manager

The Challenges

London-based IDBS provides data management and analytics solutions to R&D organizations in the life sciences, healthcare, academia, government, consumer products, finance, and manufacturing industries around the world. Established in 1989, the company serves more than 30,000 users at more than 250 client-organizations through offices in the U.S., Europe, China, Japan and Australia.

IDBS began with an IBM Lotus Notes based workflow to generate and track customer billing, and to generate revenue Key Performance Indicators. Consultants’ time was tracked using a Microsoft Access based application, while summary data from this system was manually transferred to the Lotus Notes system. This was recognized as a time intensive and inefficient process open to human errors which would only get worse as the company grew in size.

IDBS also faced a separate expense tracking system based upon Microsoft Excel.

Once data had been input and processed, producing the necessary status reports was tedious and time consuming. “We spent up to two days at the end of each month entering data

that wasn’t current by the time the process was completed,” said David Winter, senior project manager. “We were very restricted in what we could see and didn’t have the responsiveness we needed,” he added. Even more time was added to the reporting cycle as reports were circulated, reviewed and corrected before being finalized.

“The inabilities of being able to record time accurately and efficiently lead to revenue being ‘lost’. If consultants entered a half-day’s work when it was actually three-quarters, those discrepancies accumulated and a great deal of billable time was lost,” Winter explains. “We knew we could improve revenues simply by being able to record the time properly.”

In addition, the existing system

- Created discrete, segregated databases for each of three geographic regions that could not communicate or share information easily
- Could not provide appropriate, ready-to-use data to the finance and accounting departments
- Was difficult for consultants, who travelled frequently, to access through dial-up connections

At A Glance:

- **Company:** Consultancy specializing in data management and analytics solutions for R&D organizations worldwide
- **Employees:** 230+
- **Industry:** Professional services
- **Location:** London with 7 satellite locations
- **Challenges:**
 - Existing time and expense tracking system could not keep pace with growth.
 - Inefficient manual processes hampered productivity
 - No access to real-time data
 - “Siloed” regional databases could not share information
 - Revenue was being lost due to incorrect billing and invoicing
- **Tenrox Results:**
 - **Optimization:** Unified, real-time data is now accessible across the enterprise
 - **Accuracy:** Data is now validated at input and automatically flagged for incorrect entries

The Solution

When IDBS began looking for a professional services automation solution, it did so with a list of required capabilities and features that included:

- Unifying the existing siloed databases and providing real-time data access
- Integrating with SalesLogix (the company's CRM system) and Microsoft SharePoint (for document management)
- Automating time and expenses recording
- Improving billing accuracy
- Providing web accessibility

IDBS quickly developed a short list of three possible solution providers. Winter says, "It became evident rather quickly that Tenrox was the most professional solution we considered, so our decision was an easy one to make."

The Results

Since implementing Tenrox, IDBS has been able to address all of the time and expense issues that had been complicating its ongoing growth.

In addition to eliminating manual processing and multiple data entry, Time and Expense Tracking consolidated all data into a single, unified database. As a result, the company has access to real-time updates for key performance indicators (KPIs), and status reports are generated in minutes, rather than days. "The timeliness of the information gives us a critical advantage we didn't have before, since so many areas of our business are impacted by the matters addressed in the reports," Winter explains.

IDBS has extended the functionality of the core Tenrox product by employing the user defined fields feature to

capture proprietary information, for example, revenue region, project type, and contractual information. Custom reports built by IDBS quickly flag incorrect or inappropriate entries, thereby improving the quality and accuracy of the base data.

The company is also taking advantage of the system's workforce planning capabilities. This is enabling projects to be completed more quickly and with larger revenue margins—the results of more consistent and better managed project staffing. Once the company develops a historical record of projected and actual results, it plans to begin leveraging Tenrox's resource planning capabilities as well.

IDBS' improved productivity and profitability have proven that it made the right decision by selecting Time and Expense Tracking. "We knew that Tenrox's robust functionality would accommodate our needs now and continue to serve us well as we grow," says Winter.

For more information about how Tenrox can provide solutions for your project workforce, go to www.tenrox.com or call 877-483-6769.

- **Efficiency:** Reports are generated in minutes instead of days
- **Costs:** Better management control via workforce planning
- **Revenue:** Faster, more accurate expense and invoice processing

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