

# Agency Workflow

## Moving from Excel to Database Solution

**8,000**  
Jobs  
Tracked

**10mil**  
Revenue  
Invoiced

**50%**  
Workflow  
Efficiency

**30%**  
Invoicing  
Efficiency

Job requests manually tracked through an array of Excel Spreadsheets. Account team was filling out paper forms and submitting requests via job jackets. Management of dates and tasks had to be revised manually, a laborious, redundant process prone to errors.

[illegible][illegible]

COST RECOVERY RATE BY STAFF			
By Chris Settle 04/25/2015			
between 04/01/2015 and 04/25/2015			
Staff Person Name			
Dorner-Voss: 9342 - IV Reelock/PLUP Single	Hours	Rate	Billable
	1.00	130.00	130.00
Message Entry 9317 - ME Washington Central	10.00	150.00	1,500.00
Message Entry 9341 - SEC Webhook/PULL	27.00	100.00	2,700.00
Scup Country Canada 9343 - SCC Coburg Bay	0.50	150.00	75.00
VMS Holdings 9348 - VM Web Revised S&S	2.00	150.00	300.00
VMH Holdings 9349 - VM Pandora Banner Rev	0.50	150.00	75.00
Vince Quallan Total	15.00		2,250.00
Staff Person : Lauren Cosgrove			
	Hours	Rate	Billable
Jeffrey Smith: The 9289 - JS Webpage reader	2.19	150.00	328.50
Message Entry 9274 - ME Online Marketing Bld	27.00	100.00	2,700.00
Online Info: 9088 - OW Brochure Book	0.46	150.00	69.00
Online Info: 9276 - OW Online B	0.14	150.00	21.00
Lauren Cosgrove Total	34.17		3,988.50
Staff Person : Andrea Dea			
	Hours	Rate	Billable
Message Entry 9275 - ME Recruitme	3.50	150.00	525.00
Tafelberg Health Care Inc: 9330 - TP Webhook	2.00	150.00	300.00
VMH Holdings: 9351 - VM Emails	2.00	150.00	300.00
Andrea Dea Total	6.25		637.50
Staff Person : Scott Burns			
	Hours	Rate	Billable

**Process** – Formed sample user-base, mapped workflow and prioritized needs. Researched a variety of options. Selected solution that best aligned with defined business requirements. Conducted initial testing with user groups, implemented feedback to optimize solution. Provided pre-launch training to the broader staff.

**Solution** – Analyzed business needs and roles, and optimized workflows for each stakeholder. Implemented an electronic job entry and tracking system that met the specific needs of agency—custom job entry, full job/project management and invoicing capabilities. Enable customize reporting to track productivity, volume and revenue.

**Measurement** – Greatly enhanced the agencies capacity to view and track job details in real time, including ability to view history and analyze trends. Enabled employee time tracking and streamlined the billing process. Reduced time spent managing agency workflow by 50% and improved invoicing efficiency by 30%.

**Conclusion** – Function point continues to evolve with the agency. In addition to tracking all project and job related data, the system provides detailed client reports that track time on accounts to justify/validate client fees and retainers. Also provides aid for the management of headcount.

**Chris Settle** Provides hands-on creative leadership, end-to-end project oversight; planning, strategy, estimating, creative development, through delivery and beyond. Driven, results oriented with a personable, get-along work style. A mix of visual branding, advertising and multi-channel design expertise, yielding cohesive, on message, fully integrated solutions. B2B, B2C with a whole lot of retail experience. **206.719.7319 | chrishsettle@gmail.com**