



Goodbye Chaos. Hello Collaboration

How HDMZ Increased Productivity with One Integrated System

 INDUSTRY

Digital & Creative

 SERVICE

Digital Marketing, Creative,
PR & Content, Strategy

 LOCATION

San Francisco, CA
Sacramento, CA
Chicago, IL

 COMPANY SIZE

45

 WEBSITE

www.HDMZ.com

The pitfalls of organized chaos

Being the operations leader of your digital agency is a big job. Not only are you in charge of making sure your team is working as efficiently as possible, you are responsible for vetting all of the technology they use to remain productive day in and day out. Luckily, there are tons of different tools you can choose from to help your employees communicate with each other, manage projects and track time.

But an abundance of choice doesn't mean operational success. Working with a bunch of tools to solve a bunch of problems only ends up causing more issues in the end, creating higher costs and lower productivity the downfalls of organized chaos.

This is what Rebecca Angelos, VP of Operations, experienced when she joined Zoomedia in 2011 (later acquired by Harris D. McKinney).



“When I walked in, it was organized chaos,” said Rebecca. “There were a lot of systems; people were using different things. The systems that were in place, no one liked.”

Trying to connect the dots

The first problem that Rebecca and her team were facing was a breakdown in collaboration. "Nothing was talking to each other," said Rebecca. The system the project management team used wasn't helping with people actually doing client work, and then you had the sales team stuck in Salesforce and they weren't communicating downstream. So you never knew what was coming down the pipeline. Finance and billing was separate again in Quickbooks each role felt kind of organized, but when you stepped back and looked at the business, it was chaos."

While this cocktail created management headaches, The breakdown was causing serious day to day issues for the whole Zoomedia team, leading to persistent failures in internal communications. "Even though one project manager was using Basecamp to manage their work, people would have to use another system to enter time," said Rebecca. "While obviously inefficient, it really hurt the most when trying to get things done. For high value clients on tight deadlines no matter how much you try to hide it, so much friction, so much waste and so much frustration isn't something you can keep out of client sight."

The third pain point that Zoomedia was facing was the ability to train new employees on all of the tools they were using to run the agency. "When I came aboard, I had to get trained in these different systems, and it was like I couldn't keep them straight," said Rebecca. "Do I go to Basecamp? Do I go AtTask? Do I go to the wiki page? Time was entered here; management was entered here, and sales were entered over there and it was very overwhelming."

Where communication rules

When Rebecca and her team started using Accelo, the email capture functionality in the system revolutionized the way they worked. "The number one thing for us is the communication tool," said Rebecca. "The fact that emails are captured is the big piece of it." Now, Rebecca and team can keep up with client work at all times, even when someone goes on vacation. "So many times people have gone on vacation and you are trying to figure out what the heck a client said," said Rebecca. "I can go in and find the client, and I can find the conversation and know exactly what happened."

Training to the T

Accelo also makes it easier for Rebecca to train new members of the team. "When anybody new starts here, there's one system for them to know," said Rebecca. You go to one platform. That's where you do everything... versus having to use three or four or five different systems."

A bright future

In 2013, about a year after Rebecca and team started using AffinityLive, Zoomedia was acquired by a much bigger agency, Harris D. McKinney (HDM). "The one reason for the acquisition was each company complimented each other without redundancies," said Rebecca.



Cleaning up shop

After the acquisition, Rebecca saw that the HDM team in Chicago had been struggling with many of the same issues she and her team faced in 2011 when they rolled out Accelo. "It was the same thing that I walked into at Zoomedia in 2011," said Rebecca. "There was a lot of systems. They were using Basecamp, and they were using Clients & Profits to enter time but nothing was talking to each other." Rebecca decided to show the team what Accelodid for Zoomedia, in hopes to roll out the system to the entire new organization of HDMZ. "I showcased Accelo to their project management team, and they loved it," said Rebecca. Because of Zoomedia's success and HDM's need, Accelo was implemented company wide after Rebecca's demo.

The hub of happiness

Rebecca explains why Accelo is at the heart of everything that happens at HDMZ:

"It's an all encompassing system. We don't have to have our accounts and sales teams isolated in Salesforce anymore because we do all the sales that we need to do within Accelo. If we want to send emails out and do grouping we can do that through Accelo, and it hooks into Campaign Monitor. We have Accelo hooked into Quickbooks, so there is a certain part of Quickbooks that actually goes into Accelo. It's an all encompassing system that does everything we need. It's the centerpiece to what we are trying to do."

Chi-town Efficiency

Rebecca shares how Accelo makes the production team in Chicago more efficient:

"It makes the production team more efficient because again it's one system and before they didn't have tickets or jobs. There were three different sheets that our Director of Project Management was maintaining on a daily basis in order to keep track of everything. Then if you had a project to give to somebody, it was literally a piece of paper or it was a folder or it was like, 'You have to have to do this.' So everything was all paperbased or conversation based. After the acquisition, we couldn't work by paper, it's really inefficient. So now, you open jobs and see the numbers right there. It's easier to track, and anyone can go in and see their projects. They know exactly what they are working on by the filters that they can set up. They don't have to understand the entire system. It's basically go in, look at your assignments and enter your time."



"It's (Accelo) the centerpiece to what we are trying to do."

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