



Project Management for Ongoing Projects

While many agencies start out chasing...

one-off projects, the best operators know the secret to long term success is to work strategically with their best clients. The benefits are clear: more predictable revenue, the ability to unlock long-term value for your client and even the ability to lock in your services as part of their business processes.

Unfortunately, though, most of the tools and applications used to run agencies today are focused on delivering one-off projects, leaving your most important clients and work exposed, prone to error, over-servicing and under-charging.

That's why Bang! Online Marketing turned to Accelo and its unique contracts and retainers module to implement their Lifetime Customer Model, which has both increased the quality of their client service and boosted profitability.

Working with a lifetime customer model

The way Bang Online works with clients is by first identifying their key challenges and key objectives. They then propose a mix of services to achieve those objectives, working on a traditional project approach for the first month's implementation and then transitioning to ongoing services start from two months in and onward.

Approximately 60% of their customers are subscribed to ongoing services on a monthly basis, and normally work with them for a minimum of 12 months. "We know their businesses through and through, and have a solid relationship with these customers," says Managing Director Renae Lunjevich. "The ability to seamlessly transition from a project implementation phase into an ongoing service phase with the same client using the same tools, framework & billing has helped us turn this good theory into a reality".

Challenge:

About 60% of Bang Digital's clients are subscribed to monthly services, but traditional softwares are only focused on one-off projects. Bang Digital needed a tool that would track ongoing projects, while helping them avoid the leaked revenue they faced with untracked meetings and support tasks.

Solution:

Bang Digital turned to Accelo due to its unique retainers module. They were able to automate their client contracts with recurring template tasks and auto-generated invoices. They also used Accelo's automated timesheets to make sure all client meetings were tracked.

Results:

Bang Digital was able to instantly pull monthly reports to see how the business was doing. They saw increased profitability, since they were able to track every client activity. The retainers module also helped Bang Digital to build team efficiency with automated recurring contracts and notifications.



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Renae Lunjevich
Managing Director
Bang Digital

Getting hands-free with automation

The way Bang Online operates means that they have a lot of clients who pay a monthly management fee for their online marketing services. As such, they needed the right functionality to record time spent per month and per contract.

Bang implemented Accelo in 2012 and have come to rely on the unique Contracts and Retainers Module, solving their monthly service needs.

The Contracts and Retainers Module allowed Bang Digital to do the following:

- Roll time over each month
- Create recurring template tasks
- Choose the number of hours for each period
- Approve time at the end of each period
- Add activities (issues, emails, meetings) to a retainer
- Auto-generate invoices

Accelo allowed them track all of the work linked to their retainer clients. The hours logged, emails sent, projects finished and meetings scheduled are all brought into one basket at the end of the billing period. Anything that is billable becomes charged at a fixed hourly rate and all of the staff at Bang Online Marketing complete their monthly billing with ease.

Making up for lost time

If you were a taxi driver, you wouldn't give away free rides to customers going a short distance. Unfortunately, most service businesses do just this because it is too much hassle to manually keep track of meetings, reports, calls and email support when you're in between big projects. While sometimes this work is just part of maintaining a client relationship, there are often some clients that take up more time than others. These meetings and emails, small as they might be, add up fast - just 10 emails each week of back and forth with a client costs you over 5 days of billable time each year!

At the end of every month, Bang Online takes a look at their monthly client report and sees how much time went into servicing a client. Project Manager Jon Ogden tell us, “occasionally, we have some clients who require additional reporting or

meetings”.

“We use automated timesheets in Accelo and can see where we over-spent our time and most importantly if it was beneficial to the client. If it was a benefit, we can use this information to suggest an increase in management hours to compensate for additional time spent on meetings or reports.”

This feature alone has increased profitability for the company in the long-term. From a time-management and business efficiency point-of-view, they have seen massive benefits in terms of improving their servicing abilities and ultimately, their ROI since implementing an automated platform.



Increase your business efficiencies, eliminate unnecessary administrative costs, and maximize your cash flow.

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