



## Avoiding Boom & Bust

### Like many web agencies, GRAYBOX spends a lot of time winning

and delivering great digital projects. However, as all too many agency owners know, the stress of constantly chasing new clients and relying on project revenue has its own problems. Not only is project revenue lumpy and delivery stressful, focusing on projects rather than ongoing relationships means all the work you put into winning the project becomes a faded memory.

"The secret to overcoming the feast and famine project cycle is to deliver a range of ongoing services and build a close, consultative relationship for the long-term," explains Paul Weinert, the founder of GRAYBOX. The GRAYBOX strategy is simple: never lose clients after winning them. If predictable revenue

and better margins aren't enough, Paul also knew that a close, ongoing relationship with clients gives GRAYBOX a better understand of their business, resulting in better work and improved results.

### The Catch - Managing Chaos

Of course, the only downside to providing ongoing services is the effort managing it; keeping track of tasks, hours and budgets manually makes the effort seem worthless. "Many web agencies will usually provide ongoing website support," Paul explains. "With support tickets, the work you do is reactive and small - making it difficult to keep track of."

As a result, many agencies will take a loss on small support tasks or won't offer other ongoing services because they can seem more difficult to manage

#### Challenge:

GRAYBOX struggled to keep track of tasks and budgets and lost revenue from untracked time due to manual time tracking. They relied on a simple project management software that failed to transition from sale to project to ongoing services to invoicing.

#### Solution:

Switching to Accelo was a no brainer for GRAYBOX because of its retainer module. After completing a client project, they can seamlessly move them into a pre-approved retainer type and auto-generated invoices.

#### Results:

GRAYBOX has continued to scale their business and the number of projects they work on with Accelo. Client engagement and retainment has increased due to the visibility they have on all client communications.



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**Paul Weinert**  
Founder  
GRAYBOX

than their worth. While there are plenty of project management tools for a digital agency to choose from, when it came to managing ongoing services, Paul soon found there were few products that could handle the transition from project to ongoing work effortlessly - after all, it is the same client, the same team and the same sorts of design, development and consulting work.

"We needed an application that could record the work done for a retainer and invoice clients every two weeks," he explains. GRAYBOX chose Accelo because it was the only platform on the market that could go from sale through project and into ongoing services - all with invoicing built in.

## The GRAYBOX Process

"95% of GRAYBOX's clients stick around after a project is done."

Typically, GRAYBOX begins its client relationship with web development. "Once a project is done, we typically move them into one of three different types of retainers," he says. Each of their retainers are pre-approved hourly agreements with clients:

- Online Marketing
- Conversion Optimization
- Hourly Website Support
- Term-Based Website Support

"Most of our clients will start with web design and development and continue with online marketing and ongoing website support," Paul notes.

"Auto-generating invoices and tasks is awesome," he tells us. Now that they're on Accelo, GRAYBOX runs their regular invoices with ease. "We setup our support services in Accelo's Contracts & Retainers Module," explains Paul, "I just quickly approve the work done, generate the invoice and send it off to clients."

"Another thing that's awesome is its flexibility," he adds. "GRAYBOX does things a little differently, with hourly billing instead of fixed fees." Fortunately, Accelo was built to handle just about any business process.

## The Outcomes

Not only does GRAYBOX continuously grow their number of projects, they go beyond to build a thriving business. They retain almost all of their clients and are able to better guide them with the long-term relationship provided by ongoing services.



***Auto-generating invoices and tasks is awesome, I just quickly approve the work done, generate the invoice and send it off to clients"***

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