



Automation That's Indispensable

How Waypoint Boosted Productivity by 40% While Doubling Their Client Base

Two years ago, Mat Grant joined a small team of cloud integrators called Waypoint (Formerly Ocius Digital) as their Client Service Director. Founded nearly three years earlier in Melbourne, Australia, Waypoint helps small and medium-sized businesses implement cloud software solutions, taking the pain out of selecting and integrating powerful tools so their clients can work more efficiently, day-in-day-out. Ironically, Waypoint themselves were using a lot of cloud services to run their business, but it wasn't going well - they had a plethora of tools, rather than one system for running the business.

"When we were small we could get away with cheap services or free apps like the ones we were using," said Mat. As they grew, however, Mat and the team realized that "having so many separate tools became a real nightmare, and we knew it would only become more difficult for our next hire. Our processes were way too manual, we relied too heavily on asking each other for answers to simple questions, and we were struggling to scale with the tools we had."

Their cocktail of SaaS tools at the time was familiar to many businesses. "We used WorkflowMax for sales outlines and

proposals, Pipedrive for sales tracking and account management, Asana for projects and tasks, G-Suite and Google Docs for communication, and Zapier on top of that to tie it all together." This combo of disconnected tools was challenging to work with - even for a team of tech-savvy cloud-integrators - and things became impossible when they began to expand their services beyond Australia to the US and the UK. Mat considered implementing a traditional ERP style tool like Netsuite for the business but was put off by the fact they relied on legacy technology, had big upfront costs and would take many months to deploy.

Searching For Client Work Management

A few months later, the team had become ever more frustrated and desperate. They'd tried in vain to make the fragmented systems work together in a streamlined way, and then they found Accelo.

"I just couldn't believe it. Like, holy crap! Can I actually automate all the stuff I hate? I remember our Managing Director (Dan Fairbairn) giving me a walkthrough of the product and I had to rub my eyes - I really couldn't believe it. In Accelo, I could see all of our contacts and all of our client histories in one place, including all the emails we had sent and received over the years - it was



Tools Replaced by Accelo



Hours Saved per Person per Day



Revenue Increase



Team Productivity Increase



Doubled Amount of Clients



"Having a foolproof system in place means that as we scale the business, each team member always has access to the information they need within any given module."

Mat Grant
Client Services Director
Waypoint

mind-blowing. We could see everything that had happened with a client without having to go into another team member's inbox because it was all there in front of us! That was massive. I had never thought it could be so easy for me to find the information I needed, but there it was in Accelo."

Mat explained that the next most valuable perk he noticed about working in Accelo was being able to see where the company's profits were being leaked, in real-time. "We didn't realize we had so much leakage, particularly when it came to tracking and closing off client work. But now, all the billable time we spend engaging with a client is automatically being tracked for us, and that's then easily converted into revenue."

Prior to using Accelo, Waypoint had no record of their client interactions without manually sifting through emails - meaning all the time they spent in their inbox was lost into a black hole. "We couldn't bill for that work, and on days where we forgot to log work because we were too busy, that just turned into lost time and money," said Mat.

"Now with Accelo we can see exactly where our billable and nonbillable time is spent in an instant, regardless of how busy we are. This means we can work more efficiently, identify our problems, and see which clients are bringing in the most revenue - insights that used to take us hours and hours to get before Accelo."

According to Mat, Waypoint was spending close to the same amount of time on billable work as they were on manual, redundant admin tasks. For every hour of productive work completed, there was almost an hour wasted in "busy work" - manual effort to keep track of things across multiple systems. The result is a boost in team productivity of over 40%.

Saving time, money, and scaling with ease

Besides automating Waypoint's time tracking habits, Accelo has improved the company's overall efficiency on a daily basis - so much so that "it's become ingrained in the way we progress everything, including sales opportunities, starting and closing projects, recreating retainers and solving tickets," said Mat.

"Having a foolproof system in place means that as we scale the business, each team member always has access to the information they need within any given module." That way, the Waypoint team don't need to waste time jumping between various tools just to get the data they need to grow. As Mat says, "having one hub for everything is truly indispensable - we can get more done with the same amount of people, and without adding hours to our day."

"I can safely say now that 90% of our busy work is automated and handled by Accelo - so we no longer need to waste time doing non-client facing work."

In addition to the day-to-day efficiencies gained with Accelo, Mat has also seen a dramatic decrease in the time it takes to manage the business. Monthly audits, billing, and key account management tasks - that used to take many hours - are now a breeze, meaning Mat can focus his time on clients and growing the business. "For example, we can do invoicing in batches, which eliminates the need to create the several invoices over and over again. That alone saves us a tonne of time and significantly increases our revenue."

Saving the best for last...

When asked what the best thing is about working in Accelo, Mat said it's undoubtedly the company-wide transparency they've gained with one fully integrated system. Because Waypoint works across multiple countries and time zones, they needed flexible software that allowed them to be productive anywhere, anytime.

"Our hours are not traditional 'clock-in-clock-off' at nine and five, so we needed Accelo if we wanted to operate effectively like this from different countries. Having this kind of transparency means we can get on a call with our UK office without spending half the time explaining the context because they've already been able to look up the issue - we're discussing in Accelo prior to the call."

"The best part is that this eliminates the need to have meetings about meetings! Everything is crystal clear." In fact, his love for Accelo grew so profoundly that he signed on as a Certified Partner almost immediately - to help other businesses implement client work management technology. "We've already introduced our customers to Accelo, and their reaction has mirrored our own. We want to help ambitious businesses take control by removing the guesswork and enabling them to make better decisions."

"But for us specifically, Accelo means growth. It's the system we rely on to grow internally as well as financially," and that's something all service professionals deserve to have.

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

Start your free 14-day trial at scale.accelo.com

