

Consulting Success Stories

Below, are some interesting consulting success stories in a number of industry areas. New stories are regularly rotated into this document but all stories have one common element: they are all about consultants who produced outstanding value and prodinst. The companies that hired these consultants achieved excellent results. (Note: all company, consultant and product names have been removed or changed from these true consulting success stories. Not all of the consulting listed below was done through the Productivity Institute.)

Customer Relationship Management (CRM) Solution with Integrated Back End Financials

A profitable, but troubled mid-sized company was looking for methods and tools to better understand customer pipeline activity as well as the best approach to these business opportunities. Through a rigorous assessment and planning stage along with critical support from top management, the company implemented a valuable CRM solution for both the company and its users.

Specific project goals included:

- Better pipeline visibility
- Better integration with back-end financials
- Better user experience
- Increased user participation to gather complete data
- A single system for sales and marketing with growth potential to include service personnel
- Easier system maintenance
- Lower cost of ownership
- Ability to provide a disconnected on-the-road solution
- Access to standard opportunity data for sales analysis, for example:
- Percent closure
- Time to close
- Loss ratio / reason
- Marketing campaign success

An enormous ROI was achieved including a significant decrease in training time.

CRM-based Solution Streamlined Operations to Boost Productivity

The client's requirements:

1. to improve customer service
2. to provide access to customer credit information and other customer- and product-related data including sales histories
3. to accelerate collections and better control and track sales processes

Using a CRM solution, the company can now store product information including inventory and pricing, access complete customer histories and credit, sales and accounts payable data. New workflow procedures were also created that automate existing business procedures including the automatic notification and tracking of sales and customer service issues while providing management oversight.

An Accounting Solution for a rapidly growing company that just made a major acquisition

A small to midsize company was operating with a limited accounting system it had outgrown. On top of this, it acquired another company with a different – and equally limited – accounting system.

The requirements:

1. to select an accounting system that could grow with the company
2. to consolidate accounting information from both systems into one system
3. tracking their extensive inventory, equipment rentals and retail customer base

Working closely with an outstanding consulting service, the company was able to select and configure a powerful accounting system that could meet all of its requirements including complete compatibility with future company growth. Because of the completeness of the solution and the knowledge of the consultants, the company was also able to avoid an additional major IT cost. In addition, several customized reports were built, providing additional time and money savings for the client.

Editing/Writing: WIKI Implementation

(Note: A **wiki** is a page or collection of Web pages designed to enable anyone who accesses it to contribute or modify content, using a simplified markup language – def. Wikipedia)

A small company had a disaster of a WIKI system. The goal: to construct a clean, hierarchical, WIKI system, within a month.

This was accomplished by installing and implementing a powerful WIKI tool and migrating all of their existing documents. Within the month, their 50+ engineers were WIKIing their designs – self-docing, happily creating organized content.

Project momentum was greatly enhanced not only in the doc, but also in the code - since with increased definition, the engineers were able to see their designs easier and drive code momentum.

Web Development: Using a Cloud

We consulted on a cloud server infrastructure project to assist a very compute-intensive web application with many moving parts to leverage the Amazon EC2 and S3 cloud services. The goal was to create a dynamically scalable architecture that would expand and contract automatically to respond to server traffic and job load.

This application and company ended up scaling up 10X in 3 days. During a particularly heavy ramp up after the launch of the Facebook version of their application, they scaled from about 40 servers to over 4000 and were signing up over 20,000 new users per hour at peak. For a startup software company to provision and utilize that amount of resources is unheard of and the company has since become a celebrity story in the cloud world. We're obviously very proud that they are using our software and that we consulted on this project in order to allow them to scale to that magnitude, and then back down again once the load had subsided, leveraging this amazing growth spurt. After all, as many of you know, if the app doesn't work the first time, a user isn't coming back (especially on Facebook).

IT – SAN project

This project resulted in a backup & restore product that could backup & restore all server platforms (Unix/NT/Novell) regardless of content, from a centralized system. This effort required coordination with multiple vendors, disparate system managers for multiple platforms, in addition to careful management of client expectations. I planned and supervised all activities throughout the entire life cycle of this project from conceptual design through implementation and on-going support. I ensured on-time and on-budget delivery of all tasks. The project was completed to the very successful testing phase, and was a pioneering implementation of the Storage Area Network (SAN) concept.

Call Centers

In the early/mid-90s, I consulted on a 2-year project called Versit, a consortium for CTI (computer telephony integration) application specifications (full gamut), PDI (personal data interchange, which became vCard), and other technologies (H.320, T.120, GeoPort).

Team members included senior engineers and marketers at two of the largest computer makers and two of the largest telecom equipment suppliers in the world.

Once completed, the standards were taken over by ECTF, which then became CompTIA - and many additional standards have evolved from that early initial set.

Technologically, the concepts created in those specifications are common play in computer + voice applications today (e.g., iPBXs, call center apps, voice-chats, Outlook vCards, Internet-based voice applications, etc.)

Professionally, almost 15 years later, I am still getting new work with ties made from that contract. I know many of the people on that team also benefited in the same way.

Project Management

One of the most successful projects I worked on was an internal order management system for a financial services software company. Prior to implementing the new system, things were falling through the cracks: issues were not being resolved; functionality that was contracted for was not being delivered in a timely fashion; functionality was being delivered that was not contracted for; and completed projects were not being billed in a timely fashion. Customer requests were being tracked in emails and spreadsheets. Some requests were verbal and never documented.

Since this was a new system most of the time was spent gathering and clarifying requirements. A lot of time was spent creating buy-in among the project stakeholders. Since this solution was for a software company a lot of time had to be spent justifying and selling the tool that was selected to the project stakeholders. Momentum was created by piloting the solution in a specific department and then generating interest in the rest of the company from the success of the pilot and subsequent rollouts.

Executive Coaching

Challenge: Janet contacted me for help after her boss, the CFO, shared the results of a 360 feedback performance appraisal. Her boss, her colleagues and direct reports all expressed confidence and appreciation for her work, skill set and dedication to the organization. However, she was perceived by all as distant, sometimes cold, overly

demanding, authoritarian and often unapproachable. Janet also had a history of verbal outbursts in situations of conflict or high stress. Janet agreed that she needed to better manage herself, her time and her emotions, but did not know where or how to start.

The Results: After six months of weekly one hour coaching sessions by telephone, Janet was promoted to VP. She also repaired inter-personal landmines at work and in her personal life. Janet learned to build better relationships, develop a more flexible and engaging communication and leadership style while also building a new perspective that allowed her to see change, challenges, stressors and even failures in a new light; which helped her inspire, engage and lead the best in herself and in others.

A new understanding of strengths and areas of challenge were critical in our work together as was Janet's perception of her strengths, her challenges and her commitment to the coaching process and its power to help her achieve her goals and objectives. Improving inter-personal communication, leadership and time management skills was powerful, as was Janet's ability to see challenges differently.