

Case Study **intellilink**

Client Type	Advertising Agency
Project Type	Job Tracking System Implementation
Service Offering	Systems Implementation and Change Management

The Challenge

One of the largest advertising agencies in the world desired to implement a customized web-based job tracking portal as a front end to its production job tracking and financial management system. The new system handled job number creation, job start notification, call reporting, estimates, purchase orders, job closure, reporting, and other key job tracking activities. The new portal was intended to facilitate client cost management and foster timely communication about job status amongst production team members.

The current system was not intuitive and often difficult for inexperienced users to navigate. The system did not provide users with the most up to date information, and did not allow them to view and manage all impending client job charges. The reports provided by the current system were cumbersome and often included inaccurate data from the internal production departments.

The agency lacked standardized job tracking controls, guidelines, and procedures. Client requirements, instead of agency financial management and other data needs, drove most of cost tracking activities. The responsibilities of estimating and managing client job costs were unclear and inconsistent from account to account.

The Solution

Intellilink undertook a multi-pronged approach in order to address the agency's challenges, and to maximize the benefit of the new system.

- 1. Process Analysis and Functional Requirements Gathering.** Intellilink organized a multi-disciplined team made up of department leads from Finance, Account Management, Project Management, Print and Broadcast Production, Client Accounting, and Information Technology. The objective was to gather functional requirements that truly captured the needs of all parties involved in job costs tracking. Intellilink conducted group process workshops and one-on one interviews to document as-is processes and identify improvement opportunities. The team developed to-be processes which incorporated proposed systems functionality and job cost management procedures. The re-design emphasized gathering quality data at the source, providing real-time access to information, and establishing better ownership of costs management by the appropriate departments.
- 2. Policy Development.** Intellilink wrote a Job Tracking Policies and Procedures Manual based on the improvement recommendations created during the process re-design. The policy manual was the first document created to standard production roles and responsibilities across account teams. This document spelled out guidelines including,

account management's interaction with clients, turnaround times on signed original and revised client estimates, and purchase order requirements for internal and external vendors. Intellilink managed the agency-wide communication of the document and tailored key messages for each department. The policy manual was critical as leadership wanted to ensure that agency employees understood that the job tracking systems rollout was not simply an IT exercise, but a transformation in the way the agency conducted business.

- 3. Systems Implementation.** Intellilink identified a key account on which to pilot the job tracking system. The team selected the account based on the equal volume of print and broadcast work in its pipeline, timing of production, and complexity of the client requirements. Intellilink recommended that the IT department pilot and implement select functionality in a phased approach instead of releasing all of the new systems functions at once. The phased approach allowed the pilot team, to socialize and become comfortable with each system function versus being overwhelmed by an overnight system rollout. This approach also allowed the developers to tweak and enhance each function as the pilot group provided feedback. Intellilink developed and managed the implementation plan, oversaw the release of each function, and recommended system enhancements to facilitate the new job tracking processes.
- 4. Change Management.** Intellilink organized the training, communications, success tracking, and other change management efforts. The team developed presentations for each department lead to communicate key process and policy changes to their staff. We also managed job tracking system training for the pilot and other account teams, and created feedback tools for users to provide input on the new processes, and recommend systems enhancements.