Case Study: Workflow Tool Selection and Implementation

PROJECT BACKGROUND

The large in-house creative services team at Omega Co.* was using a homegrown system to track project statuses, invoice clients, and report usage trends. But the system was cumbersome, limited, and not meeting the needs of the organization. The legacy tool did not allow the creative team to achieve many best practices, including:

- Tracking time in real time
- Reporting on utilization and productivity metrics
- Evaluating and balancing workloads
- Creating reports without significant effort

Substantial efficiencies were able to be gained through implementing a best-in-class project management/workflow tool.

PROJECT SCOPE

Omega Co. engaged Cella to analyze the department's needs, document requirements, and recommend an off-the-shelf system to replace the legacy product.

Cella conducted a needs analysis with stakeholders from across the creative team. Those needs were aggregated and vetted against best practices. The resulting system requirements were documented within a vendor scorecard with a weighted importance. Cella then identified a short list of vendors who could fulfill the client's requirements and organized system reviews between the vendors and client. Both Omega Co. stakeholders and Cella reviewed the potential systems utilizing the scorecard to identify the best-fit solution.

PROJECT OUTCOME

Following identification of the solution, the client's procurement team worked with the vendor to contract for services. After which, Omega Co. engaged Cella to support implementation of the tool, which included interfacing with the vendor, project managing implementation, customizing the system, and training users.

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OMEGA CO.

department at-a-glance

company profile
fortune 500
pharmaceuticals company

department size
> 75

funding model
chargeback

department capabilities
- print design
- interactive design
- web development
- presentation design
- video production
- webcasting
- project management
- account management

project & time tracking system
homegrown

Optimizing the Business Side of Creative