

Case Study

OpenAir Professional Services Guarantees Continued Success at MarketBridge

MARKETBRIDGE

Private Firm

OpenAir users: 175

Expenses

Invoices

Projects

Resources

Timesheets

Workspaces

Integrations:

salesforce.com

Possessing an understanding of a client's core needs and processes is the trademark of an effective services group. Without this knowledge, software implementations often fail before they ever get off the ground. However, by truly learning how an organization operates, experienced services groups are able to mold their software solution to the needs of their clients.

MarketBridge, a sales and marketing services firm, was able to leverage OpenAir professional services to optimize their return on investment. Founded in 1992, MarketBridge is the leading global professional services firm focused solely on sales and marketing effectiveness. Core to their philosophy is the belief that every company can realize significant improvements in both shareholder value and customer satisfaction by creating competitive advantage and operational excellence in how they bring products to market. The organization works with Fortune 500 and high-growth companies to create new go-to-market strategies, lead operational transformations, and manage in-market programs. MarketBridge is headquartered in Bethesda, Maryland with offices in San Francisco, Seattle, Toronto, London and Singapore ...

Immediate Results

Only a year into its use, OpenAir has exceeded expectations and automated many business processes at MarketBridge. At the simplest level, time and expense tracking has become more streamlined. “Prior to OpenAir our time and expense system provided limited approval processes and manual, infrequent reporting capabilities,” said Cary Comer, Principal at MarketBridge. “Now these figures can be reported “on-demand” and monitored by multiple levels of approval.”

On a more advanced level, resource management, financial reporting, and invoicing have all been improved by OpenAir. Previously, resource management at MarketBridge consisted of Microsoft Excel spreadsheets which provided limited automation and audit capabilities. “OpenAir has provided us with a single system to house all our resource assignments. We now have a change process to quickly and accurately make sure our consultants are assigned to the right projects, and by making their availability more transparent to project managers, utilization levels are increasing.” With a strong base of time and expense data, reporting has become more structured and automated. MarketBridge schedules reports to be run daily and delivered via email to the appropriate stake holders. Prior to OpenAir this was not possible as many manual and third party systems were leveraged for corporate reporting needs.

The ultimate success of OpenAir at MarketBridge is greatly due to the guidance and support of OpenAir Professional Services. From initial requirement discussions to post implementation support, OpenAir’s services team has acted as a trusted advisor. “OpenAir’s services team has been first-class from the start,” said Comer. “They took the time to understand how we wanted to run our business, and configured the software to meet our needs.” During the implementation lifecycle, MarketBridge leveraged OpenAir’s services team to clarify requirements, configure the OpenAir system, and solve post implementation support issues.

Collaboration Leads to Success

When implementing a new software solution, configuring the system to meet your business needs is just as important as initially selecting the software itself. “We came into our initial meeting with a list of requirements we thought we needed. OpenAir was able to clarify these requests, refine them, and demonstrate how the system would support them.” OpenAir Professional Services provides best-in-class examples of process, configuration, and measurement techniques. They facilitate the design of user groups, approval workflows, and custom reports that guarantee you get the most out of the system. Also, the ability to seamlessly integrate OpenAir into broader system environments allows clients to preserve their investment in other applications.

Within only six weeks from signed contract to system go-live, OpenAir was up and running at MarketBridge. “We were amazed at the OpenAir consultants’ breadth of understanding regarding the system,” said Comer. “Their deep knowledge and communication around business challenges and roadblocks eased the growing pains inherent with any new software implementation.” During the configuration all custom attributes of the MarketBridge PSA solution were configured including user setup and access permissions, workflow creation, and report creating and scheduling. Integration with salesforce.com as well as export mechanisms to share data with their financial and payroll systems were also established.

Since their initial launch, MarketBridge has had access to their initial implementation team for questions, adjustments, and suggestions. “The greatest asset that OpenAir brings to the table for us is that the consultants who set us up are still with the company. They know the ins and outs of our configuration and we do not have to bring a new consultant up to speed any time we run into an issue.” Through user and administrator training and ongoing adjustments to their salesforce.com integration, OpenAir continues to support MarketBridge even after implementation. As business processes evolve and the need for added automation increases, MarketBridge plans to engage OpenAir professional services yet again to set up integrations for their financial and payroll packages. “OpenAir has become a centerpiece of our services architecture. In the near future, as we evaluate our current financial package, we look to build on our past success and explore possible integration options with our remaining point solutions.”