



How Financial Performance Improved when JPL Partnered with Workamajig

CASE STUDY



“Workamajig provides visibility and accountability to our projects. We’re invoicing proactively and on time. As a result, we have far better cash flow than we ever had before.”

Bob Wolfe,
LEAD PROJECT ACCOUNTANT, JPL



JPL Integrated Communications, Inc.

Founded in 1989, JPL is one of the Mid-Atlantic's largest integrated marketing agencies. It helps brands with everything from content creation to delivering digital brand experiences to facilitating employee engagement.

HIGHLIGHTS

CHALLENGES

- Juggling multiple systems that didn't talk to each other
- Business decisions (e.g., when to hire employees) relied on best guesses
- Efficiency and profitability took a hit without a project management solution

SOLUTION

- **Finance & KPIs** to assess profitability, guide hiring, and automate invoicing
- **Project management** to track conversations, manage files, review change requests, monitor budgets, and more
- **Built-in dashboards** to help every role operate efficiently and simplify time tracking
- **Integrated data** to fit everything together into comprehensive reports

RESULTS

- Fully-integrated systems that scale alongside JPL's growth
- CRM, financial, and project communication systems replaced with Workamajig
- Holistic insight into project profitability helped turn an unprofitable relationship into one of JPL's best

Challenges

LACK OF PROJECT VISIBILITY LED TO UNINFORMED DECISION MAKING

Before JPL started using Workamajig, they had jerry-rigged an enterprise resource planning (ERP) solution out of five or six different tools. These included a CRM, a finance tool, a different tool for project management, and yet another tool for time tracking.

While all of these tools worked well independently, there was a problem. According to Lead Project Account Bob Wolfe, most of their systems just didn't play well with each other.



He says, "We really liked tools like Microsoft Dynamics—the finance tool we were using—but it didn't tie realistically into anything else. It just didn't work with our other systems."



A lack of integration made what should have been simple business decisions, like which roles to hire for, far more complicated.



He says, "Before Workamajig, we were growing—but we were doing so a little blindly. We made business decisions without the right data."



Worse, macro-level business intelligence wasn't as clear as they wanted it to be. Reporting was fragmented, invoicing wasn't timely, and key stakeholders had little visibility into project profitability.

How many people were working on this project? How long did the project last? How long did each task take? JPL needed all of this insight brought together under one roof.



"We knew we could do more to manage our projects even better, to close them out sooner, and get invoices out the door," Bob says.



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Solution

HOLISTIC AND EFFICIENT PROJECT MANAGEMENT SYSTEM

Workamajig is a fully-integrated software system built specifically for agencies and marketing firms. It includes everything they need in one place, including project management, resource management, time tracking, accounting and financials, sales and CRM, and more.

Bob gets the most mileage out of Workamajig's built-in finance and integrated data reporting features. These enable him to run comprehensive reports, monitor cash flow, and send invoices pre-populated with client- and project-specific data in minutes.



"We're talking far more value in terms of accounting and accuracy. Being able to look historically at our projects and see how close we were to our estimated budget, where our shortcomings were, and where we may need to adjust hours is great," Bob explains.



These reports are directly tied into the heart of Workamajig—its project management system. In addition to allowing teams to generate schedules, manage files, track changes, and allocate resources, it also allows JPL to monitor budgets and gauge each project's profitability.



"Workamajig pulls data from every department into simple reports that enable us to justify our business decisions. Straight numbers when it comes to things like profitability let us take a hard look at what we're doing and how we're working with clients," Bob says.



Workamajig also makes life easier for each individual team member. Every role at JPL has a built-in dashboard with all the report data and actionable information they need on a day-to-day basis. Dashboards include task lists and user-friendly time tracking, so projects stay on-task and bills are accurate.



“When we onboard new employees, we introduce them to Workamajig on day one. The tool makes it easy for strategists, developers, designers, and all new hires to track their work—all they have to do is input time and expenses,” Bob says.

“We’ve certainly matured in terms of how we onboard people.”



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Results

INTEGRATED SYSTEMS LEADING TO SMARTER BUSINESS DECISIONS

When JPL first adopted Workamajig, their agency had roughly 80 people. Now they’ve grown to more than 125 team members, and Workamajig continues to scale with them.

Even though JPL keeps growing, they don’t need to manage—or pay for—multiple separate systems to support their growth. In fact, Workamajig has empowered JPL to retire several of their old systems including CRM, financial, and project communication systems.

But while cost-savings are nice, Bob says that the biggest benefit has been the holistic insight that Workamajig brings to the table:



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Client profitability reports have also had a major impact on existing client relationships—and JPL’s bottom line. For example, one client profitability report helped JPL face a hard truth: one of their oldest partnerships wasn’t profitable.



“It wasn’t until we created a client profitability worksheet through Workamajig that we realized we weren’t profitable with a specific client. We were consistently in the red in terms of hours put in versus the amount we billed,” Bob explains.



JPL braced itself for a break-up conversation... that never happened.



“They called us up and said, ‘Tell us what you need.’ We have a great partnership and we were able to work something out. It’s been five or six years since then, and they remain one of our biggest clients—except now, we’re both extremely happy with one another,” Bob says.



For agencies like JPL, Workamajig means better reporting and business insight, a streamlined way to keep projects on-task and on-budget, and a flexible and fruitful partnership that continues to scale with their needs.



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