How Ten Adams is Leveraging Workamajig to Drive Business Insights and Profitability

1–2 hours
saved per report
every month

$10,000
saved annually
via CSI integration

"I highly recommend Workamajig because I love the functionality, the custom reporting that you can do out of it, and its ease-of-use. There's a lot of customization, so it's easy to find a perfect fit for your environment."

Anna Jordan,
CONTROLLER, TEN ADAMS

TEN ADAMS ^{IO}

Ten Adams

Ten Adams is a healthcare branding, marketing + advertising agency.

They are strategists that transform business challenges into powerful brand experiences for hospitals and healthcare organizations.

HIGHLIGHTS

CHALLENGES

- Bringing project, budget, scheduling, and accounting insights together in one place

- Helping siloed teams adapt to new technology and increase efficiency

- Finding a strategic partner to support Ten Adams' ongoing growth

SOLUTION

- **Finance & KPIs** to assess profitability, guide hiring, and automate invoicing

- **Configurable reports** generated in seconds help guide strategic decisions

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Challenges

UNITING PROJECTS, BUDGETS, SCHEDULING, REPORTING, AND ACCOUNTING UNDER ONE ROOF

Ten Adams is a leader in the healthcare marketing and consulting space. Few agencies can hold a candle to their long history or deep experience. One of their key differentiators is—and has always been—their ability to adapt and embrace digital transformation.

But when they first added Workamajig to their technology stack, they hit a snag. As Controller Anna Jordan explains:

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> "We weren't using Workamajig to its full potential. We were creating extra work for ourselves. We weren't scheduling tasks out. We weren't resourcing. We weren't tracking budget versus actual. In a lot of ways, we were working blindly."

Ten Adams was still using manual spreadsheets for far too much of their workflow. Their entire team was busy, but a lot of time was spent "recreating the wheel," such as when Anna needed to generate project budget analysis or month end reports.

workamajig

- **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

- Business leaders have holistic insights into project and team profitability

- Remote teams effectively collaborate and communicate on projects

- Reports that used to take hours to compile are now ready with one click

- $10,000 saved annually thanks to CSI integration

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"I used to spend a whole lot of time in Excel, downloading data, entering it into a spreadsheet, and trying to figure out the best way to view it," Anna explains.

With Workamajig, Ten Adams had the potential to gather everything they needed in one place—projects, budgets, scheduling, reporting, and accounting. It opened the door for the team to work smarter instead of harder. The only challenge: getting everyone on board.

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"The challenge was getting everyone on the same page—we had people in other departments trying to use other solutions and we were stuck in our silos and our old way of doing things."

Determined to get the most out of their system and increase efficiency across the board, Anna, leading the accounting side, and a project manager reached out to Workamajig.
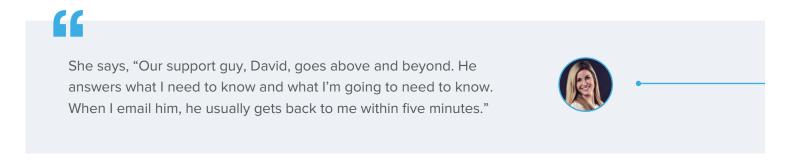
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Solution

EVERYTHING TEN ADAMS NEEDS IN ONE PLACE

The first thing Anna did was interview experts from Workamajig's list of on-site consultants. They connected with Ad-vice Software & Consulting, Inc. and Creative Performance, Inc.

She also contacted Workamajig's support team—and was delighted by the speed and responsiveness of her dedicated support manager.

> "
> She says, "Our support guy, David, goes above and beyond. He answers what I need to know and what I'm going to need to know. When I email him, he usually gets back to me within five minutes."

With the help of these consultants and Workamajig support, Anna began implementing efficiency improvements and facilitating company-wide adoption.

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> "I use Workamajig all day. I enter and pay vendor invoices. I load in our budget for the year, client revenue, and forecasted expenses. That enables me to pull financial statements and generate custom reports. The custom reports that you can build—that's probably my favorite thing about Workamajig."

Configurable reporting enables Ten Adams to quickly and accurately assess budgets, calculate project profitability, forecast revenue, manage resources and workloads, and more.

> **"**
> "We need to have this information all in one place because it's the most valuable way to look at the whole picture," Anna says.

Some of the reports that Anna uses on a regular basis:

Project Budget Analysis reports enable project managers to view a project's status against the current budget. By measuring work completed against the budget used, they're able to assess the validity of the project or course-correct if needed.

A custom-made **Rolling Forecast report** enables Anna to look at actual income and expenditures from previous months and predict upcoming actuals, all in one sheet.

Work-In-Progress reports allow for more accurate financial analysis. By analyzing the aging of projects, Ten Adams is able to keep project managers on task, validate the charges that are actually going to be billed, and avoid overstating their income.

One improvement came in the form of adding estimates to each project. This helps creative and digital teams track project health and ensure that they remain on-time and under-budget.

Workamajig has also streamlined communication and collaboration.

> **"**
> "Instead of saying, 'Hey, check your email or Zoom or SharePoint, we can just look directly in the project and see what's going on," Anna says.

When Ten Adams began using Workamajig, they had a basic 10-person account. They now have 33 users, and Workamajig continues to scale with their needs.

Anna says that for planning purposes, the wide adoption of Workamajig has already made a world of difference.

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"When we receive a check from a client, we put those estimates into Workamajig and we can earmark that money for upcoming expenses. It makes my job so much easier," Anna says.

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one place because it's the most valuable
way to look at the whole picture."

Results

INTEGRATIONS AND AUTOMATIONS YIELDING TIME AND COST SAVINGS

Being able to see profitability by client or by project helps Ten Adams build toward future success and properly focus their efforts moving forward. Leadership members can view everything from resource utilization to cash flow with just a few simple clicks.

Having one integrated solution that offers all of this visibility, while simultaneously promoting team collaboration, gives Ten Adams a strong competitive advantage in a crowded marketplace.

> Anna says, "One person on my team works out of Florida. Myself and another operate out of Indiana. You can work from anywhere, and all of your data is in one spot. It's great."

Workamajig streamlines and simplifies necessary tasks. Key integrations renders cumbersome processes that leave heavy paper trails almost effortless—and save Ten Adams money in the process.

> Anna says, "Before, we used to print out checks from my office to pay vendors. Now, we have Workamajig integrated payment processing through CSI. It helps us save time paying our vendors, while literally making money in the process. We made over $10,000 in a year by using that service and it reduced our labor. Win-win, for sure."

As for Anna, Workamajig is saving her time on a monthly basis. Now she spends less time compiling reports, and more time using those insights to help Ten Adams continue to dominate its niche.

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"There was a lot of stuff that I used to do monthly by hand, like creating rolling forecasts, that now I can just click a button and generate through Workamajig. That one report alone saves me one to two hours per month," she says.

If Anna ever needs to create a new report, she's glad to know that David and the friendly support team at Workamajig has her back.

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"It was pretty intuitive once I got into it, but if I ever can't figure something out, I reach out to Workamajig support and they get me on the right path," she says.

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"I highly recommend Workamajig because I love the functionality, the custom reporting that you can do out of it, and its ease-of-use. There's a lot of customization, so it's easy to find a perfect fit for your environment," she adds.

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Save time. Save money.
Get everything you need in
one place, with Workamajig.

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