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Case Study:
Workamajig Gives Matchstic Power To Strike

Background

Matchstic is a 13-year-old, Atlanta-based branding agency. Its team includes strategists, designers, writers, photographers, and illustrators dedicated to the specific challenge of creating brands for clients. The company's website proudly declares that "we aren't a full service agency," identifying itself instead as curiously offbeat collaborators, and nice ones at that. It works with clients to create brand strategies, brand names, visual identities, packaging, taglines, and more to build and reinforce the client's identity in its market.

Becky O'Mara, Operations Director, Matchstic:

Matchstic is a premier brand identity house, founded in 2003 in Atlanta, Georgia. Our unique combination of strategic thinking and smart design enables clients to define their identity, express that clearly in the market-place, and ultimately build a brand that creates long-term value for the owner and the consumer.

Matchstic

Situation

In 2011, Matchstic was a young company, about eight years old, and just getting past the point where a text document on someone's desktop was enough to manage project traffic. That's when Becky O'Mara joined the company and started to formalize operations. At first, it was a printed calendar and then some tracking in Basecamp, but most often, O'Mara herself was the traffic management system.

As business advisors began to ask tough questions about profitability and team-member utilization, the entire company woke up to a pressing need for something more structured. Further, the company saw better traffic management as a means to greater profitability and more visibility into its overall health. Without tracking the data created by projects moving through the agency, it was impossible to really know if Matchstic was being as efficient as possible.

O'Mara: We're a relatively young company. We're about 13 years old now. I came on board about five years ago, and that was really when we started formalizing more of our processes. Before then, we had three designers, and traffic was a text document on someone's desktop. We would decide week to week what everyone's working on. As we've grown over the last five years—we've added a formal strategy department and a messaging department—traffic management became a real felt need.

For a while, traffic was literally a printed-out calendar on my desk, and that was scary to everyone. We had some stuff in Basecamp, but there was also a lot in my head. I think there's also a maturity aspect. We felt like we should be a lot more profitable than we were as a company, and we just couldn't pinpoint why we weren't, so we wanted to start making some of those connections. We had business advisors who were asking us really good questions about our profitability and team-member utilization and if we are getting as much out of our team members as we think we should or if we are meeting industry standards. Even what types of projects are most profitable and what kinds of clients we should look for. We had a hard time answering those questions with hard data.

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Solution

O'Mara says that the company had stable processes for tracking its operations, but had trouble finding tools that matched Matchstic's needs. It cycled through several systems, about one a year, investing time and energy into tracking software that didn't connect the success and profitability of individual projects to the bigger picture of how the firm was doing overall. The company president, Craig Johnson, identified several options recommended from people in the industry and other local companies and then brought O'Mara in to help vet the various choices.

O'Mara: We used Basecamp for project management, and we loved Basecamp, but it didn't track time. It didn't track profitability or budget within that. So we had to use a separate program for time tracking and budget tracking, and even that was not great for tracking employees' billable time. Further, none of it integrated with our bookkeeping, which at the time was outsourced to a freelance book-keeper, so that was not integrated at all. That was the real attraction of Workamajig: Something that integrated everything. The individual components seemed great, too. It was comparable to what we were doing in QuickBooks and comparable to what we needed out of Basecamp.

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Workamajig emerged from the search because of its unique ability to connect team performance, profitability, and financials. Matchstic saw the promise that Workamajig held for understanding and improving Matchstic's health and performance. While O'Mara admits there was a period of getting used to the system, it passed quickly, and soon Workamajig was providing insight she calls irreplaceable.

O'Mara: Workamajig now impacts everything. Traffic, project management, team-member assignments, bookkeeping, budgeting, sales pipeline management—we pretty much do everything in Workamajig now. There are different levels in which people are on it. Designers primarily get project details and log their time, but our sales team and operations team are in it all day long. All of our bookkeeping is in it now, all of our sales pipeline management is in it, and then, of course, our project schedule and traffic are in it, as well. It touches every piece of what we do.

Benefits

O'Mara says that, over the last two years, Workamajig has provided Matchstic with a far better handle on its traffic and financial health. Billable hours have increased, expenses are under better control, and billing is more accurate. The management team can see what kind of work is most profitable and efficient, bookkeeping is more predictable, and there is more structure around everything the firm does.

O'Mara: We have a better handle on our expenses now and are billing more back to clients that we probably missed in the past just because of sloppy bookkeeping. We've seen individual team-member billable hours increase as a result of Workamajig. We also love using it to manage our sales pipeline and forecasting. Overall, our firm is growing and becoming more efficient and profitable, and a large part of that is due in part to us using Workamajig.

In addition to running a tighter ship, there are more specific cases where the company could accomplish things it wouldn't have tried before Workamajig. For example, a short gap in the calendar for two designers was identified as a request for a short project for a small company. It wasn't the kind of project that Matchstic would typically take, but because Workamajig helped it identify the capacity, it was an opportunity the firm could confidently take.

"We have a better handle on our expenses now and are billing more back to clients that we probably missed in the past just because of sloppy bookkeeping."

O'Mara: We knew we could do the work well, on time, and on budget. The transparency that Workamajig gave us, where I could say to Craig, "I know we typically don't take these projects, but we have this gap. Let's do it for the budget they've got. I think it'll work for all of us."

We've never had that transparency before where we could forecast availability and take advantage of a project we would typically say no to. We ended up doing great work, and the client was thrilled.

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In addition to taking on small projects, Workamajig also helps keep larger clients happy by identifying what it takes to meet specific timeline needs profitably without sacrificing the work. A project that typically takes six weeks was needed in just under five weeks. Before Workamajig, it would have taken a team meeting and hammering out schedules to determine if it was possible. O'Mara opened Workamajig and, in five minutes, saw that it would be possible to shorten the timeline enough to help the client.

O'Mara: Based on the ease of using Workamajig and adjusting the days and hours, it was a five-minute task to look and say that we can do this in five weeks. We can meet that deadline. That was another case where we could say yes when we may have said no.

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