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From Chaos to Insight

How WSOL used smart technology to work faster, earn more, & do it all with confidence

When Bill Casey started WSOL in Chicago over 20 years ago, he thought the hardest thing about building the business would be winning and keeping great clients. As time went by and their reputation for great work became more well known, Bill realized the biggest challenge to overcome was actually managing his teams work. While he could land a great client for a marquee project, unless the operation was run well, the project wouldn't be profitable and could hurt the business.

After trying what felt like everything - from customizing Salesforce, to tying together a motley crew of disparate tools - Bill had almost given up on finding technology and was about to invest heavily into building something himself. That is, until he came across Accelo. This is the story of how Bill and the WSOL team were able to use smart, integrated technology to boost their productivity by 20% - in effect, **they stopped wasting every Wednesday.**

When all you've got is a (Salesforce) hammer...

Like most new businesses, Bill and the WSOL team started out doing work manually. After outgrowing the usual manual tools for keeping track of their client work - whiteboards and spreadsheets - WSOL tried to take advantage of one of their existing technology systems to solve their operational challenges: Salesforce.

Since they were already using Salesforce as a CRM, they tried to make it work for other aspects of the business. “We attempted to use it to run the production side of our business - so we had Projects and Service Tickets in there but no customer communication - and that was not a great solution," explained Bill. "Salesforce is a beast that is geared towards sales management, so the bulk of it was wasted on us. We didn't need it and it was overkill,” said Bill.

Challenge:

WSOL was trying to work efficiently with an excessive amount of cumbersome, preconfigured tools. As a result, they were losing a day's worth of billable revenue and wasting resources in places where technology was failing them.

Solution:

CEO and co-founder Bill Casey became so frustrated with his inept ‘cocktail of tools’ that he considered building his own software solution - but he couldn't find the time to do this successfully. That’s when he started looking for a solution and stumbled across Accelo.

Results:

Accelo automated Bill's entire business, increased his team's efficiency by 75%, and gave him the company-wide transparency he was in desperate need of - allowing him to focus on the creative work he loves!

"We're spending a lot less time worrying about the systems we have to use and more time worrying over our clients."

Bill Casey
CEO
WSOL

The poor fit of "the beast" and the amount of effort required by the team to try and make it do something unnatural made them decide to take another common path - implementing lots of specialist tools to help.

Trying to make it work

The WSOL team's second attempt at solving the business management problem with technology was something many businesses have done. They subscribed to multiple, disconnected solutions, and hoped that the fact that they had better individual tools would offset the disadvantages of having to keep track of key information across these multiple services.

"We used a hybrid solution for our CRM and Service Tickets, AtTask for Project Planning, and still had tickets in the other system - so it was complicated and hard to get data relating to our productivity", explained Bill. "We also had Basecamp thrown into the mix with some clients, Trello which we used behind the scenes for task planning and organizing what we were doing day to day, and JIRA which we used for more of a bug tracking tool on Tasks within certain Projects," making things a mess to work with, let alone manage.

As experienced by thousands of other businesses who've gone down the same track, the results of the disjointed tools experiment were terrible. After spending a lot of time (and money) on implementing different tools, Bill and the team still had to bring them together manually. "It was a mess; it was a lot of stuff all disconnected, and from a management standpoint it just wasn't workable - because you couldn't see an overall picture of what was going on," said Bill.

Increasing efficiency

After unsuccessfully trying to butcher the Salesforce beast, Bill and the team were about to do something truly crazy - invest thousands of hours into building (and maintaining) their own in-house hacked solution to the problem. Thankfully, before they went down that track, they found Accelo.

While Bill was attracted to the 'all in one' nature of Accelo initially, the fact that Accelo was focused on what his type of business actually needed was what really impressed him. "Retainer Management - which we hadn't found a solution to before - was great", explained Bill. "The project management and the integrated communication - it just matched us really well in terms of the types of things we were doing as a company," he said.

In addition to ticking functionality boxes he didn't even realize he could tick, the ability to streamline critical business processes unlocked a lot of value he wasn't anticipating. "Accelo also delivered everything we needed it too when it came to invoicing clients - and **that alone has probably made us 75% more efficient compared to what we used to be."**

Beyond streamlining - the benefits of confidence

While Bill was initially attracted to Accelo because it allowed him to streamline how he managed his operations, the even bigger benefit for WSOL was how much more insight and confidence Bill had in running the business.

An example that really hit home for Bill was the Utilization Dashboard, which combines all of the work being done by the team into one, interactive screen.

"With this feature we can look at who is going to be tasked out heavily over the next month and who has gaps we can fill - so basically it just helps me run the overall business and answer questions like 'are we understaffed or are we over staffed?" explained Bill.

By focusing on running WSOL's operations, Accelo has given Bill and the team a lot more confidence because they can now depend on a system to give them reliable data and insights.

"We have all this insight and visibility that we never had before which I could not do without. Its key to helping us focus on doing the best job that we can for our clients, while being as productive and as efficient as we can," Bill explained.

The Bottom Line

While it is hard to measure the time saving benefits of streamlining business operation, the impact on the bottom line has been very clear: they've increased their billable utilization by 20%.

"We email clients all the time - and we have a lot of meetings - but it was always up to the individual to remember what they did and track it, which rarely happened. But now we have the Exchange Integration which tracks all our communication, and that adds up significantly. It's legitimate billing time that we simply had falling through the cracks," said Bill.

The benefit of recovering this leaked time is that the WSOL team have in effect stopped working every Wednesday for free. And this is on top of the efficiency benefits they've already gained by having a single, integrated system.

Increase your business efficiencies, eliminate unnecessary administrative costs and maximize your cash flow by contacting us at accelo.com or call **800.425.7315**

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