



# How Coactive is helping a technology service consultancy develop their app to manage billable hours and create new KPIs

## CASE STUDY

Date:  
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### About Coactive

Coactive builds innovative and intelligent business applications on our proprietary software development platform using rapid application development workflows and technology.

[www.gocoactive.com](http://www.gocoactive.com)



“ We’re not making the business fit into the software.  
We’re making the software work around the business. ”

– Matt W., Technology Engineer

## The Company

A technology service consultancy offering a suite of integrated solutions from concept to operation. They provide a broad spectrum of services designed to enhance the performance and reliability of business operations. Their solutions impact the entire planning, project execution, and production lifecycle for manufacturing industries.

## The Challenge

**Billable hour budgets were set it and forget it...and forgotten**

The business model included a budget of expected minimum number of billable work hour for each employee. They were also allocated a specific number of internal non-billable hours they’re permitted to work. These data points were established in the budget and communicated at the beginning of each year.

Once the budget was presented there was really no way to know the number of billable and non-billable hours worked per employee, unless they each tracked their own hours. This also meant employees didn’t know if they were on target throughout the year.

*“It was publicized once, but it really wasn’t updated, communicated, tracked and reported on throughout the year”*

The budgeting was created on a spreadsheet, with quarterly data reports published on SharePoint.



### INDUSTRY

Technology service consultancy



### LOCATION

North America



### EMPLOYEES

440



### CHALLENGE

Billable and non-billable hours were budgeted per employee but not successfully tracked throughout the year.



### SOLUTION

An app that integrates and manages all employee hours while creating a better communication flow and improved accountability.



### RESULT

Instantaneous access to data along with new KPIs that were non-existent with the old system.

An entire quarter could go by without people knowing their total hours worked. What they discovered was that people weren't working as much as expected and if there were problems, the opportunity to fix them passed unnoticed until the next quarter.

## The Solution

### The app means clearer communication and accountability

At the start of the process there was no importing capabilities of the configuration from the spreadsheet. They worked with the Coactive team to build the tables they needed, while manually inputting data from the spreadsheet and timesheets.

*"Once we completed the process, we could get rid of additional manual input because the hours could be imported into the app. It was entered once. No more exporting or shuffling data back and forth which ends up saving a lot of time."*

The app was developed to achieve two main goals:

- » The first is clearer communication of expectations to each employee. Employees can now easily access their dashboard to see goals, not just at the beginning of the year but at any time.
- » The second is better accountability. The dashboard gives all information comparing goals with actuals in real time.

Developing the app features within our resource wasn't difficult to do, having been completed in a shorter timeline than expected. They were able to get feedback from users very quickly regarding what they liked and didn't like. The only downside was that the source data for the billable time was in another app that was not built by Coactive. Therefore, we had some initial integration challenges that have since been solved.

*"What we have now is a minimal viable product and it's a heck of a lot better than what we used to have."*



The next phase is to build their time-tracking system within the Coactive platform. They can build an infrastructure to handle billable time, without external integration, resulting in instantaneous data transfer.

## The Result

### Closer to targets and increased profitability

Publishing budgets, they're recording improved financial performance in part due to the information available to all employees.

*"Now that people have instantaneous access to this data, if they're a week or two behind they get upset. The bar of expectations has been raised so to speak."*

They now have a range of data to be managed in order to maintain profitability, as well as KPIs (actual hours worked per week and actual deviation from target worked per week) they can begin to measure against, which they didn't have previously.

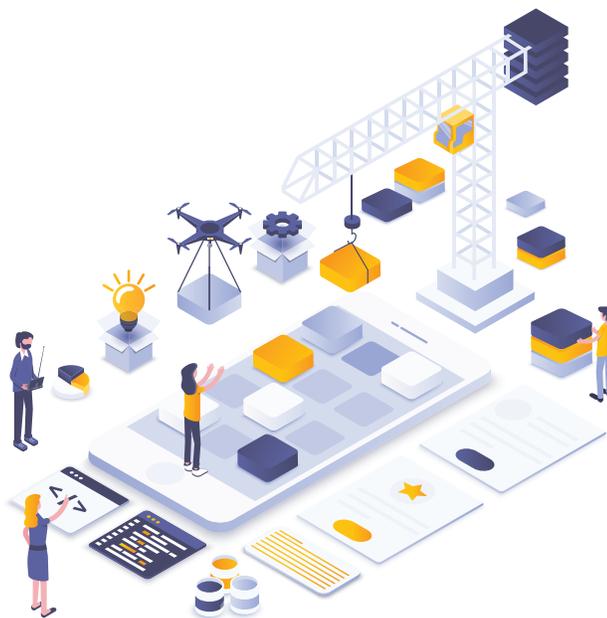
*"It's not a case that we were managing this way before and it's improved by 20%. It's that KPIs didn't really exist before...and now do."*

Not only is this a tool used to manage and track employee hours, it's also beneficial for employee accountability. They can plan their year, see where they either need to ramp up or slow down, and even determine when to take time off. It's helping to create a better life and not burn the candle at both ends unnecessarily.

*"It's also a very advantageous tool for the employee because they can track non-billable time, like vacation hours. Maybe I want to plan my work strategy to ramp things up a little bit either beforehand or afterward to accommodate my own personal life."*

Another benefit is that employees won't get sidelined if they find they're behind in billable hours by the third quarter. With all data visible in their dashboard they can ramp up their hours in a reasonable manner by the end of the year. This improvement can position them for a positive review, while meeting goals allows them to perhaps get the raise they're hoping for.

This tool gives employees and managers real-time information for assessing and managing billable hours and performance throughout the year. Budgets are met, goals and expectation are achieved.



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