◆▶ Certified

Process Innovation & Spreadsheet Elimination with Versago

| Challenges	Solution	ROI

Challenges

➢ Multi-stakeholder, critical customer and proposal intake process managed in spreadsheets

➢ High proposal intake coordination overhead

➢ Duplication of effort in translation, various proposal formats leading to errors, and delays

➢ Valuable resources allocated to data entry into SAP Business One

➢ Manual calculation and lack of timely insight to revenue and costs

➢ Employee dissatisfaction with process

Solution

➢ A simple, user-friendly web portal was configured using Versago. It enables people in different roles to access and update only the information they need to perform their job.
- Proposal draft creation
- Role-based workflow
- Automated rules-driven status updates and email notifications
- Proposal duplication for re-use
- Automated project revenue and cost reporting
- Scheduled email report distribution

➢ Real-time synchronization of portal activity with SAP Business One

ROI

➢ Redeployed several staff from process administration to value-added jobs

➢ Significant reduction in proposal errors

➢ Measurable increase in proposal cycle-time

➢ Elimination of manual project revenue and cost forecasting

➢ Appropriate visibility for all stakeholders

➢ Significant time saving resulting from clearer communication

➢ Fully leverage the investment made in SAP Business One
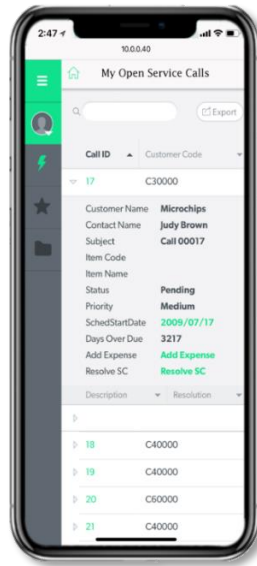
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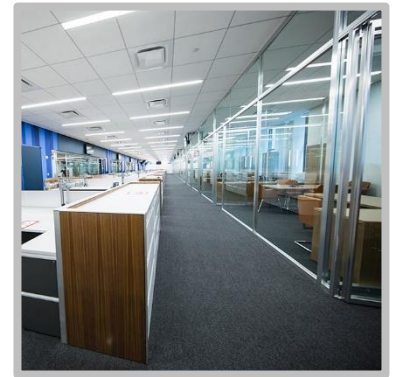
"Versago helped us streamline processes that allow both time and cost savings. The value add of Versago will carry us well into the future."

Anthony Mariani – Director, Account Management   Certified

Big Picture	**About Certified**	**About Versago**

An Enterprise Resource Planning (ERP) system like SAP Business One is the system of record for planning, tracking, and measuring operational processes. But typically, the ERP is touched by only a fraction of the people affecting the business. A business fails to realize its full potential when the larger population of employees, customers, and vendors are unable to contribute to or benefit from information on the ERP as they perform the tasks in their respective roles. As a work-around people turn to email, spreadsheets, rogue databases, data extracts that become stale, paper forms, and faxing! We call these 'speed bumps' and some of them are quite high. Speed bumps are inefficient and error-prone alternatives to a direct connection with information you need.

Speed bumps have a way of going unnoticed. Why? Because people get used to them. They're part of the daily norm. But they undermine the performance of the company and are often the root cause of employee, customer, and partner satisfaction problems!

Certified provides Project Management and Logistic Services to support the planning and execution of complex large business transitions within corporate, legal, and healthcare communities. Day Two, they employ technology-based approaches to servicing their clients' on-site logistics and off-site asset management.

Certified is the trusted industry leader and innovator in corporate relocation and installation services. Their project management teams ensure success by managing and executing with military-like precision.

Third Wave's Versago portal platform (including Bizweaver integration and process automation) accelerates information flow by enabling employees, customers, and vendors to access and contribute to critical business information in the context of their jobs while synchronized with SAP Business One. Certified is taking advantage of Versago to bring accuracy and visibility to client and project onboarding and financial forecasting.

With Versago, anyone, can accomplish their tasks easily and accurately at just the level of involvement they need in any process or activity. They can access or update any information via simple, user-friendly web pages from their laptop/desktop computer, tablet, or smartphone.

There is no end to the use-cases Versago can address. To make setup easy, Versago ships with pre-built screens and integrations to SAP Business One.

Certified-Versago Full Story

Challenges	Solution

Proposal Intake, Workflow & Tracking

The Account Management operation at Certified oversees a vital function: Proposal Processing. Customer and project-needs assessment, scope development, resource allocation, timeline, etc. all rely upon a smooth-running proposal process.

In servicing household name customers in Media, Finance, and Healthcare, there is no room for error. Certified is an innovator in the industry and decided it was time to innovate internally.

A spreadsheet-based proposal process involving account managers, relationship managers, project managers, finance and accounting, and customers had become onerous and was not going to scale with business growth.

There was too much overhead in coordinating stakeholders around a decentralized spreadsheet and email-based process. The process was error-prone resulting in excessive communication to track and contribute information to proposals. Keeping SAP Business One in sync with the process and leveraging SAP Business One to assist the process required a lot of manual effort to the tune of three administrative resources. Certified needed a way to centralize, streamline, and automate this process which is where Third Wave and Versago came in!

What's Next for Certified with Versago?

More spreadsheet eradication and process streamlining, of course! Users will soon be able to initiate a Bill of Lading in Versago to be automatically imported to an Enterprise Job in SAP. The data will also be shared with trades labor for resource scheduling by integrating SAP with current scheduling systems. This will be accomplished with Third Wave's Bizweaver integration application.

Versago as Proposal Intake Portal

Using Versago, Certified configured a proposal web portal for Account and Project Managers that enabled them to work directly with their clients and drastically simplify process administration. Relationship Managers, Finance and Accounting, and Administrators all have appropriate role-based access as needed.

From a simple web page, users can initiate a draft proposal which can optionally be based on a duplicate of a previous proposal. Information may be incomplete at the draft stage so it's important that data entry is unencumbered by too much validation. Versago provides this flexibility. Versago also speeds up data entry and enables accuracy by automatically populating form input fields with any information from SAP or other external sources based on user selections such as 'business partner'. Based on the type of service selected, required verbiage is automatically added to the form. Detail line items that can be quite extensive can also be uploaded to the proposal form from a file.

Versago performs complex field calculations based on user selections. For Certified, selected project classifications determine discounts, surcharges, and taxes. The solution also calculates project revenue and cost allocations over time based on project start and end dates. This removes a manual step for finance and accounting, especially as the information changes.

When the user flags a draft as complete, the proposal enters a workflow and according to rules and status changes, becomes available to users for review, input, and approval. Users receive automated email notifications regarding required actions.

All internal stakeholders have role-based access to status reports with links to proposal details. However, the solution automatically distributes scheduled volume reports for planning and revenue reports for forecasting.