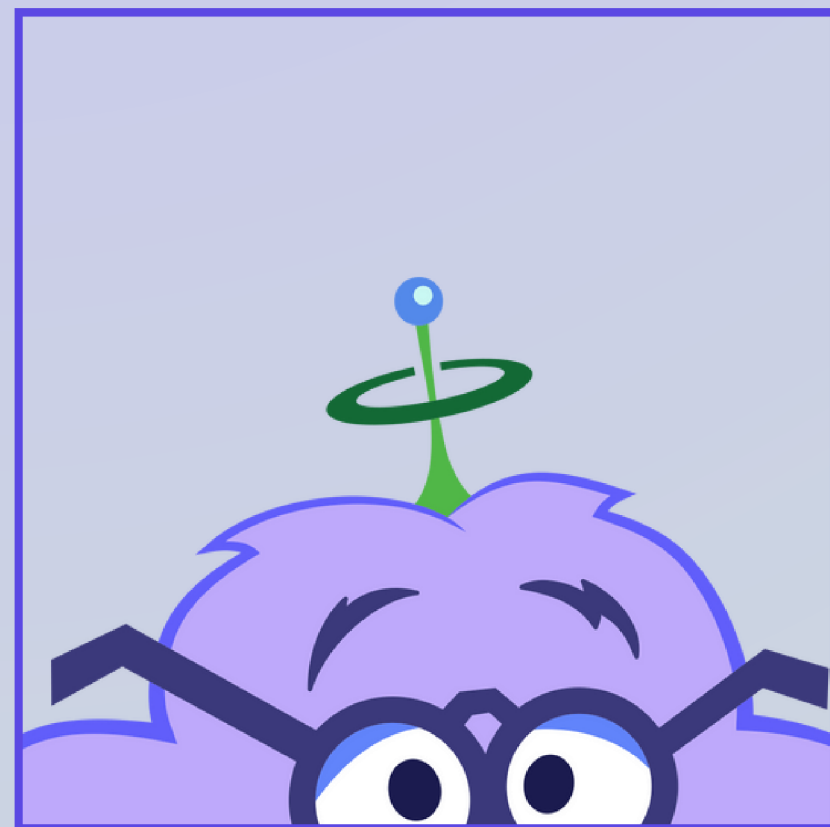




UNLOCKING THE POWER OF PROJECT VISIBILITY

A COMPREHENSIVE GUIDE FOR AGENCY SUCCESS



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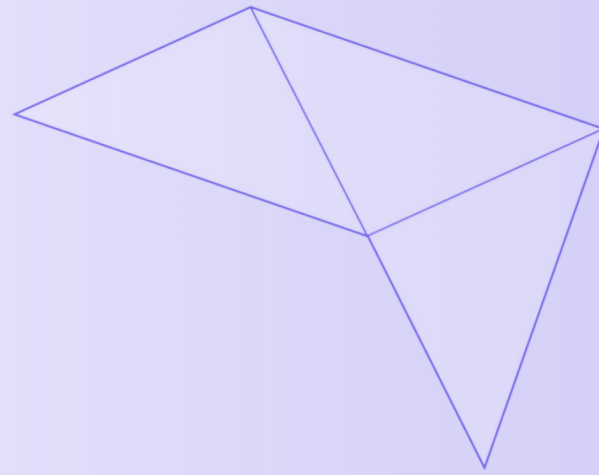
THE POWER OF PROJECT VISIBILITY

If you find client check-ins time-consuming, it's likely because you lack **project visibility**. By prioritizing project visibility, you'll clearly understand the status of all your agency's open projects and have better insight into your team's current workload and utilization. Project visibility is vital for the long-term profitability and efficiency for agencies of all sizes.

So, what exactly is project visibility? It means having a clear view of your projects' elements, from tracking timelines and resource allocation to budget management and progress monitoring. With project visibility, you can stay on top of every aspect of your agency's workflow, enabling you to make informed decisions quickly and effectively.



VISIBILITY STARTS WITH DATA



VISIBILITY STARTS WITH DATA

Data organization tools are essential for marketing and PR agencies. They help professionals present metrics and campaign analytics in a digestible format to facilitate decision-making. Without data, your agency will lack the information needed for full project visibility.

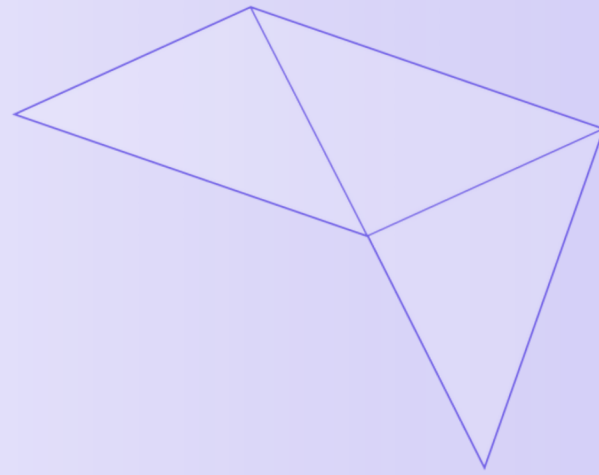
DATA BOARDS VS DASHBOARDS

Think of **data boards** as canvases where you can pin up important datasets like they're part of a sensory mood board. These can be client briefs, content calendars, or campaign progress. On the other hand, **dashboards** are like command centers, giving you a high-level view of your agency's performance with live updates and visual representations.

THE PURPOSE OF DATA BOARDS

Data boards are flexible and adjustable tools that can be customized to meet the needs of your agency's workflow. Their main purpose is to offer a platform for organizing and analyzing various datasets, setting goals, and monitoring progress. This tool can be especially beneficial for **project management**, allowing teams to track their time, budget, and resources against predetermined targets.

VISIBILITY STARTS WITH DATA



THE POWER OF DASHBOARDS

Dashboards serve as a command center, collating vital information into a streamlined view. By providing real-time overviews with charts, tables, and KPIs, they help manage an agency from a strategic standpoint.

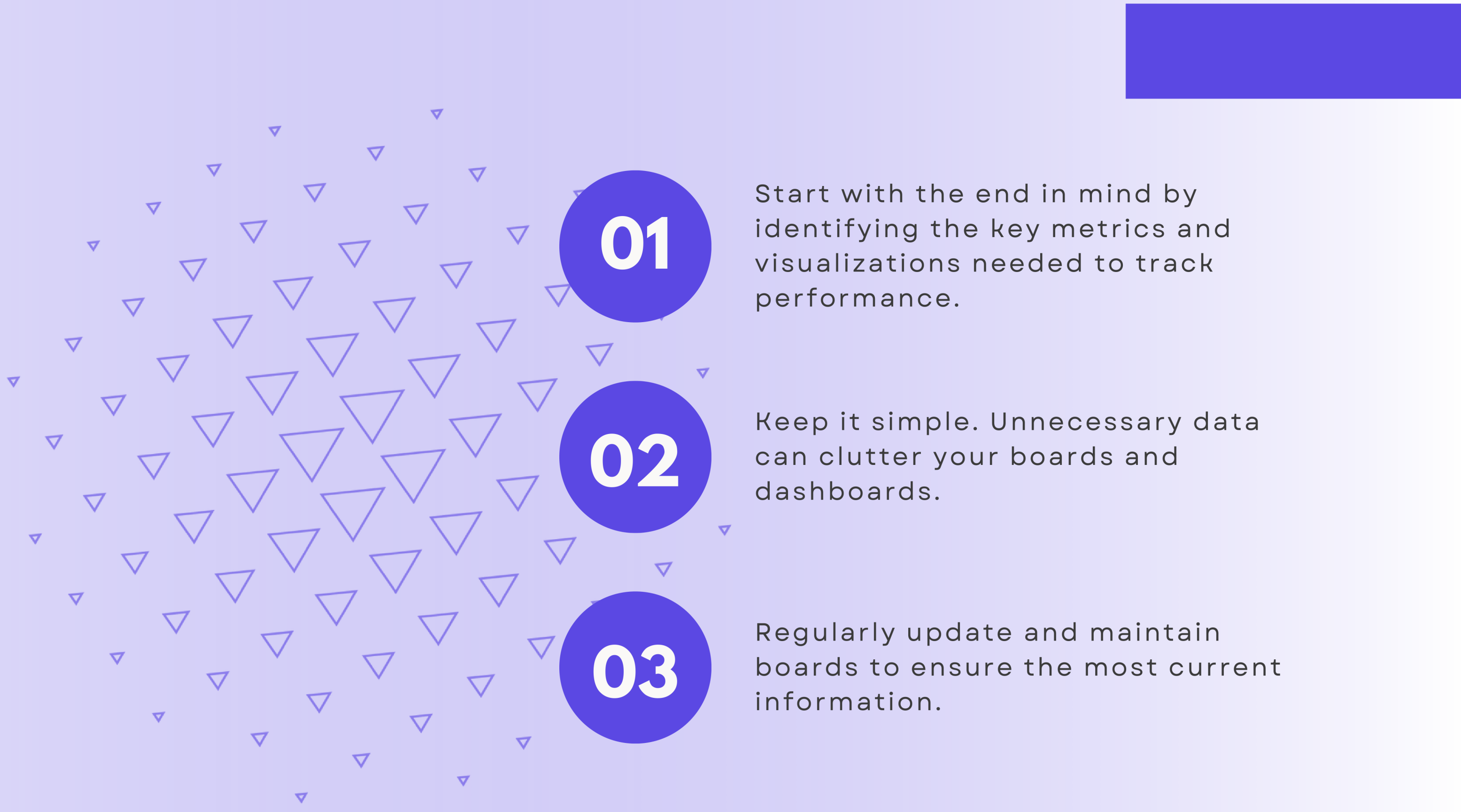
REAL-TIME INSIGHTS: WHY IT'S MORE THAN A BUZZWORD

Dashboards don't just provide snapshots; they are **live, responsive**, and can be **adjusted** to monitor the KPIs that matter most to your agency and your clients. **Real-time insights** facilitate proactive decision-making and empower your team to respond to any situation with agility and accuracy.

COLLABORATION AND COMMUNICATION AMPLIFIED

Sharing information and insights across different teams in an agency can be a major challenge. One way to address this is by using **dashboards** as a communication tool. Dashboards provide access to real-time information and ensure all stakeholders are on the same page. Moreover, they can be customized and shared across teams, making them an ideal tool for promoting **transparency** and **collaboration** across departments.

BEST PRACTICES FOR ORGANIZING YOUR DATA



01

Start with the end in mind by identifying the key metrics and visualizations needed to track performance.

02

Keep it simple. Unnecessary data can clutter your boards and dashboards.

03

Regularly update and maintain boards to ensure the most current information.

SUCCESS STORY

GROWTH POWERED BY PROJECT VISIBILITY

As independent agency **Knock, Inc.** started an accelerated growth trajectory, the team realized they were struggling with inefficient workflows and a lack of visibility. This made it challenging to pinpoint overall agency performance. So, they turned to **DelteK WorkBook** to improve reporting and collaboration. Implementing WorkBook improved tracking projects and profitability, saving time with automated reporting and planning. Knock, Inc. can be more confident in the future of its agency operations, make strong strategic decisions, and grow even more as an agency.

MAKING THE MOST OF YOUR DASHBOARDS



01

Utilize color-coding effectively to highlight trends and anomalies.

02

Take advantage of filtering and drill-down capabilities to focus on specific segments for more detailed analysis.

03

Training and regular updates on new or improved features can significantly boost your team's usage and uptake of the system.

TIPS FOR SMALLER AGENCIES



TIP #1: INVEST IN REGULAR PROJECT STATUS REPORTS

Carving out time to spend on **regular project status reports** will bring greater efficiency in the long term. It's an opportunity to get everyone on the same page, for you to gather data on the project and provide communication to keep your client happy.

TIP #2: PROJECT COLLABORATION & COMMUNICATION

Improving communication with your team and clients is key to improving project visibility. Establish **clear communication channels** from the outset, and share access to project management tools with your clients for increased **collaboration**.

TIP #3: ALL ABOUT ANALYTICS

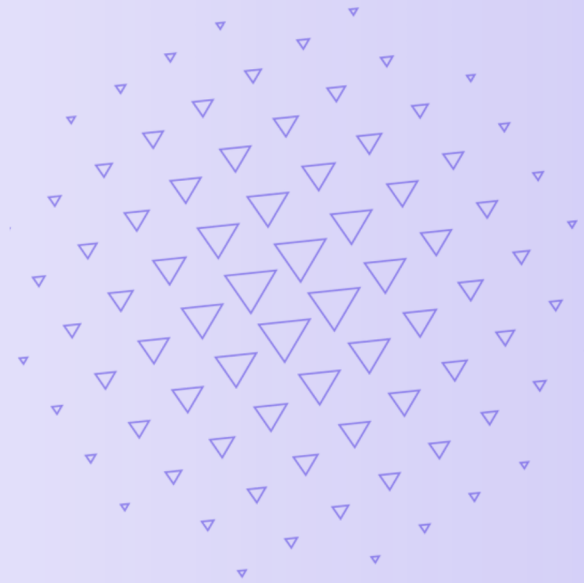
The quickest way to see how work is progressing is to set up **dashboards** or reports that allow you to access data, from time spent on different tasks to project completion percentage. Making the data easy to access will make it even easier for you to monitor your open projects.

SUCCESS STORY

IMPROVING AGENCY PROJECT VISIBILITY AND EFFICIENCY

OH Partners was looking to increase visibility for leadership, simplify media billing, streamline resources, automate manual processes, and improve cash flow and media buying efficiency. They accomplished these goals by implementing **Deltek WorkBook** to help them achieve digital transformation, manage a distributed workforce, and build a foundation for business growth. Deltek WorkBook provided OH Partners leadership a consolidated view of resource utilization and project effectiveness, resulting in reduced time to close month end, 100% time compliance, improved scope forecasting and tracking, and advancements in resource allocation.

MAXIMIZING PROJECT VISIBILITY WITH TECHNOLOGY



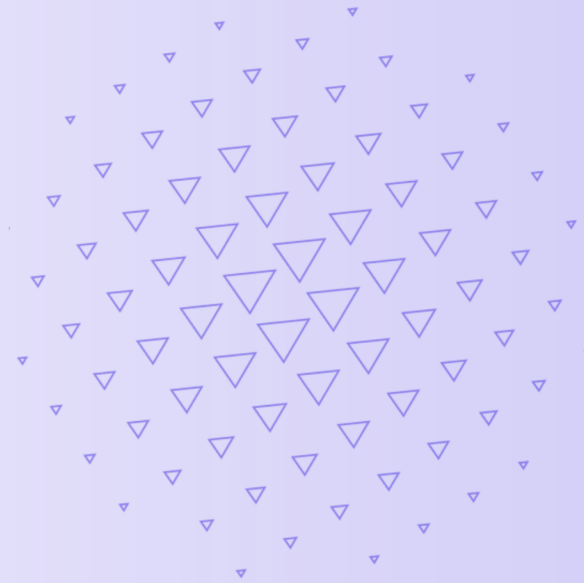
USING TECHNOLOGY TO MAXIMIZE PROJECT VISIBILITY

Delte **WorkBook** has been designed precisely to meet agencies' multifaceted needs. With it, firms gain not just a **project management tool** but a comprehensive **agency management system** that streamlines processes, fosters team collaboration and provides all-important project visibility.

LIVE DATA ACCESS

Real-time data is at the heart of project visibility. Deltek WorkBook provides live insight into ongoing projects. You can see the current status of tasks, who's working on what, and where resources are being invested at a glance. Instantaneous access means potential issues can be spotted and addressed before they become project-altering problems.

MAXIMIZING PROJECT VISIBILITY WITH TECHNOLOGY



SEAMLESS INTEGRATIONS

An agency's workload is often fragmented across various platforms, obscuring overall project visibility. Deltek WorkBook offers **seamless integrations** with various tools and systems, ensuring all information is centralized and accessible. This eliminates the need to juggle multiple apps and potentially lose sight of critical data.

CUSTOMIZABLE DASHBOARDS

Every agency has its own set of metrics that matter most. Deltek WorkBook's customizable dashboards allow you to put these metrics front and center. **Monitor the KPIs** relevant to your agency's success and be equipped to react to trends proactively rather than retroactively.

SUCCESS STORY

STREAMLINING TOOLS INTO A SINGLE AGENCY MANAGEMENT SYSTEM

TMW UNLIMITED faced difficulties managing its projects due to a complex setup of disconnected project management tools. By implementing **Deltek WorkBook**, the agency streamlined its projects and impacted its bottom line. WorkBook gave TMW UNLIMITED end-to-end visibility and control of its projects, with all pricing information, schedules, and resource requirements stored in one place. The operations management software helped the agency improve communication and collaboration among different teams, share resources across global offices, and provide a seamless experience for employees and customers when they collaborate on projects.

HOW TO UNLOCK PROJECT VISIBILITY

Leveraging a streamlined tool can improve efficiency and increase visibility, taking your agency to the next level. The right agency management software can help you automate reporting, making it easier to understand productivity and utilization. **Deltek WorkBook** is a purpose-built solution designed by agency experts to help you manage your projects, people, and agency finances in a single platform.

Not all agencies have the time or expertise to maximize the potential of an agency management system like Deltek WorkBook. That's where a partnership with **PCI** comes in. PCI's solution specialists can guide you and simplify the implementation process. We even offer a quick-start software package customized to meet the specific needs of boutique agencies.

If you want to streamline your operations and increase project visibility, contact us today to learn more about how Deltek WorkBook can help you achieve your goals.



CONTACT



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