



## PreVisor

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

### At A Glance:

- **Company:** A Software as a Service (SaaS) firm that delivers pre-employment screening tests and employee assessment solutions that help organizations connect hiring decisions with business results.
- **Industry:** Software; Consulting
- **Location:** Corporate Headquarters in Atlanta, GA
- **Challenges:**
  - Projects managed in MS Word or Excel provided little visibility.
  - Resource scheduling was tedious and manual.
  - Validation of revenue recognition figures was difficult.
- **Results with OpenAir:**
  - Visibility. PreVisor now tracks critical KPI's in real-time.
  - Automation. Manual steps have been replaced by streamlined processes.
  - Discipline. Resources now enter time and expense in a timely manner.
  - Consistency. Set practices produce consistent project deliverables.

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— Matt Chapman

*Director of Operations, Professional Services, PreVisor*

### Results

After a two phase roll out, PreVisor has moved completely away from spreadsheets and has gained increased visibility and automation. PreVisor now uses OpenAir for tracking project pipeline, planning projects, scheduling resources, and managing project revenue recognition.

With all of this data now in OpenAir, PreVisor has been able to create a weekly departmental scorecard to track key professional services metrics.

“Through our scorecard we track our project revenue pipeline, backlog, and revenue forecasts to gauge how our department is performing against our goals,” said Matt Chapman, Director of Operations, Professional Services, at PreVisor.

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In addition to this, Chapman has also observed an increase in the effectiveness and professionalism of the services team's deliverables and processes. For example, all project plans are now developed and managed in OpenAir, and there is much greater discipline and consistency around reporting time and tracking projects.

These benefits have also been visible to clients as project managers can utilize OpenAir in a pre-sales scoping meeting to begin outlining project tasks, dependencies, and milestone dates.

### The Challenges

Prior to implementation of OpenAir, a number of PreVisor's professional services business processes were manual and disjointed. Projects were managed in Microsoft Word or Excel which provided little visibility for project teams or management.



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Professional Services  
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“When sharing project plans across the organization, we emailed documents and spreadsheets,” said Chapman. “Our processes did not support cross-project visibility at PreVisor. Any time a project plan changed, an updated document was distributed to the appropriate stakeholders.”

Scheduling resources also became a challenging task without an automated system in place. “Before OpenAir, resource scheduling was a weekly event that required multiple people dedicating significant time to update work schedules. Our numerous spreadsheets became quite cumbersome and difficult to manage,” said Chapman.

Like project plans and resource schedules, professional services revenue recognition was tracked on separate spreadsheets. This made reporting and validating figures challenging. Furthermore, there was no formal time tracking system, which limited reporting of employee utilization and other project-specific metrics.

### **The Solution**

“OpenAir met our major requirement of providing project based time tracking and revenue recognition. Its scalability and configurability were huge selling points for us as we can model the system after our processes,” said Chapman. “Being a fellow SaaS vendor we are also quite familiar with and invested in their business model.”

Due to the immediate benefits that PreVisor received with OpenAir, Chapman is very optimistic about the opportunities that OpenAir will present in the near future.

“Although OpenAir was originally brought in to manage our client-facing projects, we quickly realized the benefits of expanding its scope to include internal teams and projects,” said Chapman. Now many internal projects are consolidated into one system that can be easily managed and scaled across the organization.

With over a full year of data in OpenAir, PreVisor has studied their data and has identified commonalities across clients and projects.

“By studying trends in our project data we have discovered areas for improvement that were not previously visible with our legacy reporting processes. We used this data to modify and implement new service offerings and provide greater value to our clients,” said Chapman.

PreVisor’s main goals with OpenAir were increasing consultant utilization and project profitability, while decreasing project implementation length. As more and more data is tracked and analyzed in the system, PreVisor is well on the way to realizing these goals.

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