



Projector and QuickBooks® Give Consulting Company Room to Grow

Projector Professional Services Automation software and QuickBooks give Enterprise Financial Consulting the time-tracking, scheduling, and expense management it needs to take its business to the next level.

AT A GLANCE:

- ▶ **COMPANY:** Enterprise Financial Consulting Group, LLC
- ▶ **LOCATION:** Mt. Laurel, NJ
- ▶ **INDUSTRY:** Finance, Operations, and IT consulting
- ▶ **BUSINESS CHALLENGE:**
Enterprise Financial Consulting Group's systems were holding it back. It needed a web-based solution to manage the schedules, billable time and expenses of its consultants, who live all over the U.S.
- ▶ **SOLUTION:**
Projector Professional Services Automation, by Operations Planning Systems, Inc. and QuickBooks Online Edition
- ▶ **RESULTS:**
Together, Projector and QuickBooks:
 - Automated time tracking, scheduling, and expense reporting
 - Eliminated double-data entry, while providing better reports and controls
 - Give Enterprise Financial Consulting the business intelligence it needs to make informed decisions and grow

“Projector and QuickBooks took away 80-90 percent of the work, and gave us better controls.”

Kevin O’Sullivan
Partner
Enterprise Financial Consulting Group, LLC



Enterprise Financial Consulting provides internal audit consulting, outsourcing, and co-sourcing; audit and Sarbanes-Oxley compliance services; and consulting for corporate finance, operations, and IT security. Founded in 1998, the company has grown to include 60 employees and has locations in many cities across the U.S.

Business Challenge

Primarily a consulting business, EFC has associates traveling to client sites all the time, which creates a number of challenges.

“It was a nightmare to manage time, scheduling, and expense reporting,” says Kevin O’Sullivan, EFC Partner. “Everyone used to complete Excel spreadsheets for time and expense reporting, and then our internal accounting group had to re-enter all the numbers into QuickBooks.”

The company’s consultants report time and expenses regularly so that EFC’s accounting department can bill the appropriate client, and reimburse the consultant. “We were running about 15 days behind on billing, and we were behind on paying expenses, mainly because of the paperwork,” remembers O’Sullivan.

On top of that, the company didn’t have a good solution for scheduling consultants’ time. With multiple project managers requesting resources for multiple projects, it was easy to double-book. Not only did that leave individual consultants confused about where to go, and when, but it also cost the company frustration and money in last-minute project and flight re-scheduling.

Shortly after O’Sullivan took over EFC’s operations responsibilities, he recognized that he could solve his three biggest problems with available technology. He says, “It was absolutely critical to find a solution. The process we had before wasted everyone’s time. We needed to do something else if we were going to grow.”

“I knew I needed something web based,” he says, “and I had three goals. Number one was to get invoices out quickly, which included being able to collect time and billing information. Number two was to get a schedule online, so the consultants would know where they were supposed to be, and project managers would know who was already booked. Number three was to put the time-tracking and approval process online.”



Solution Overview

O’Sullivan found the QuickBooks Solutions Marketplace in a web search, and it was there he located Projector, by Operations Planning Systems, a QuickBooks Compatible software for professional services automation.

“I looked at a few other options, but none of them had all three of the things I needed. Projector had them all, and it integrated with QuickBooks Online Edition. The decision was pretty simple,” O’Sullivan says.

Operations Planning Systems helped EFC get up and running in just two weeks. O’Sullivan says, “We signed the deal on September 1st, and we went live on the 17th. The support from OPS was incredible, and we couldn’t be happier with the system.”

QuickBooks and Projector share information about time and expense reporting, which has cut out all that messy, time-consuming double-data entry EFC’s accounting department used to have to do. “Now that we use the Projector system, we get invoices out in one day,” says O’Sullivan.

Business Benefits

Projector met each of O’Sullivan’s initial three goals. It has sped up the invoicing process, given EFC a web-based scheduling system, and put time tracking and approval online.

“We love having the centralized scheduling, but I’d have to say the biggest benefit is the new time and expense reporting,” he says. Consultants now enter their time on a web page, and push a

button to submit it. The system sends the time to the managers, and they push another button to approve it. Accounting receives the information in real time.

“Projector and QuickBooks took away 80-90 percent of the work, and gave us better controls,” says O’Sullivan.

On top of all the reasons they switched to Projector, EFC has realized a number of additional benefits. The company used to have a full-time accountant on staff that worked 40-50 hours per week. Now they have a part-time accountant, who works 20 hours a week.

O’Sullivan says managers and decision-makers really appreciate the extra insight Projector’s many reports give them. “We have a very tight process now, and it’s easy to monitor it. We capture more data, and we know exactly what’s going on. By having a top-level view of the playing field, we know who’s working on which project, and who’s most productive. We can see when we need to hire or move projects out. It really helps us make decisions.”

Operations Planning Systems support and pricing structure has also been a boon. By pricing their solution per-employee, per-month, OPS has made their product very scalable. And O’Sullivan has nothing but praise for the company’s support organization. “The support we’ve gotten from OPS has been great. We’ve had a couple issues along the way, and they’ve bent over backwards to solve them.”

“I’m very happy with it,” says O’Sullivan. “I recommend Projector to everyone—except my competitors. I don’t want them to get it!”

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