



CASE STUDY

**Patrick
Ryan
Associates**

“The other platforms we took a look at were fine, but they weren’t built for our type of business structure. CMap is.”

Glenn Pearson, Senior Operations Manager

Summary

How Patrick Ryan Associates uses CMap to save time managing the business.

Situation

Patrick Ryan Associates is a well-respected facade consultancy offering its clients high-quality facade engineering, design, specification, and survey. Though the business has enjoyed success for more than twenty years, it also experienced difficulties with time management, invoicing, and managing projects on Excel spreadsheets that weren’t synced.

“One central problem was that we had too many spreadsheets, and that prevented us from effectively managing projects,” said Glenn Pearson, the

consultancy’s senior operations manager. “On top of that, our timesheets didn’t talk to our invoicing system, which laid the groundwork for errors. Nothing was automated, and that cost us time.”

One of Glenn’s responsibilities is invoicing. To create an invoice, he had to go into Excel to extract information from a spreadsheet. However, what he needed was sometimes missing, so he had to chase down the project manager to get that information. On a good day, when all of the information was available, Glenn could still take as many as twenty minutes to get an invoice ready to send to a client.

These were serious problems that needed to be solved—and CMap was the company to solve them.

Solution

CMap is a business management tool that helps professional service organizations win more work and deliver it more profitably. The platform replaces inconvenient spreadsheets and disparate software tools while allowing businesses access to all of their data and capabilities through a single, unified system.

"In addition to solving the problems I was having with creating invoices, CMap has a positive impact on everyone's workload," said Glenn.

CMap helps the firm's technical staff with a variety of tasks, such as dealing with inquiries, sending out

fee proposals, keeping track of project work stages, checking profitability, and invoicing.

"Not only does CMap function as a CRM for the marketing team, but it also helps project managers follow the progress of a project from beginning to end," said Glenn. "The resource schedule that CMap produces helps managers determine how much staff time will be needed to fulfill a project. That helps them better manage the business."

Results

Since adopting CMap throughout the practice, Patrick Ryan Associates has enjoyed the following results:

Improve Speed and Accuracy

"Now that all of our information is on one platform, I can do my job faster and with greater accuracy," said Glenn. "That makes everyone happy."

Saved Time

"It used to take me at least twenty minutes to produce an invoice," said Glenn. "Using CMap, I can do the same amount of work in just five minutes."

Improved Forecasting Accuracy

"CMap has really helped us improve how we manage the business," said Glenn. "It gives us a real-time view of the firm's profitability, so we can easily see our budget versus expenses."

