

GROWING TOGETHER – CHANGEPOINT HELPS PRESIDIO BECOME A NORTH AMERICAN I.T. SOLUTIONS POWERHOUSE

CUSTOMER

PRESIDIO

INDUSTRY

IT Services

CHALLENGE

- Maximize billing potential and service revenues.
- Eliminate manual processes that create inefficiencies.
- Increase efficiency of services operations team.
- Strategically manage explosive business growth.

SOLUTION

Changepoint for Professional Services Automation

RESULTS

- Increased revenue by 25 percent through efficient time and expense tracking.
- Doubled size of business with no additions to services operations team.
- Refocused services operations team away from mundane paperwork to high-value aspects of engagement planning.
- Improved financial transparency through automated process for revenue recognition.

BUSINESS CHALLENGE

Presidio, one of the largest solutions providers in the U.S., offers professional and managed services for advanced IT solutions. By understanding how its clients define success, Presidio architects enduring technology that addresses their needs. The company's approach blends the credibility to deliver practical results today, with the creativity to drive the business visions of tomorrow. More than 2,400 Presidio IT professionals — 1,500 of which are engineers with more than 2,000 industry-leading certifications — are based in more than 50 offices across the U.S. With its local delivery model, Presidio can capitalize on its scale as a multi-billion dollar industry leader, while driving client results and the highest quality of service.

A Changepoint customer for more than 10 years, Presidio has evolved alongside the solution. It has experienced dramatic growth over that time frame, evolving from 46 employees and a vision to build a North American network of Cisco solution providers, to becoming a \$2.3 billion IT powerhouse.

"Changepoint has been with us since our very beginning," explains Bob Foote, Presidio vice president of IT Services and the professional services automation (PSA) solution's earliest internal champion. "In the beginning our use of the solution was what I would call one-dimensional. Yet it was still revolutionary for us at the time. Changepoint allowed us to make the leap from nothing to an automated solution for time and expense management. Right out of the gate it allowed us to capture billable hours we were regularly losing through paper-based inefficiencies. We immediately saw a 25 percent payback in billings."

SOLUTION

Since its relationship with Changepoint, Presidio has exploded in size and market reach. Foote, his colleague Ron Kennedy, Presidio vice president of Business Intelligence, and other members of the management team oversaw no less than nine acquisitions and, in addition, experienced strong organic growth.

One of Presidio's watershed moments occurred when the company began using Changepoint for billing. Up until that point, the services operations team followed a somewhat fragmented process for billing, accumulating time and expenses and creating the invoice in Changepoint, and then shifting over to Microsoft Dynamics ERP to generate the final customer invoice. "We began building integrations to better tie Changepoint, Microsoft Dynamics and our internally built 'MyOrders' system allowing for a more streamlined billing and invoicing process," explained Kennedy. "Through improved integration between our core systems, and a more automated process, we took away the monotonous paperwork weighing down our services operations team, allowing them to take on new responsibilities and focus on higher value activities." At the same time, Presidio implemented an engagement service review so engagement setup became quicker, more efficient and more accurate. "Prior to Changepoint billing, we'd have consultants in the field,

and services operations would be bogged down with paperwork working on getting the engagement set up in the system. Now we're up and running in record time and our folks are focused less on the mundane, and more on the aspects of the engagement that drive business value," said Kennedy.

"We have the best of both worlds. We benefit from a very strong, mature PSA solution, but also from a very strong relationship with the Changepoint team. It's a beautiful thing that I can go to a user conference and sit face to face with the people that are the decision makers. They listen to us and our suggestions and concerns."

— Ron Kennedy, Vice President of Business Intelligence, Presidio

In the midst of rolling out Changepoint for billing, Presidio engaged in two significant acquisitions that doubled the size of the company. "We brought on more than 600 engineers during this time period, and yet, with the process efficiencies we implemented with Changepoint, we were able to hold the growth of our services operations team and manage it with just five people," Foote explained. Since that time, the Presidio organization has more than doubled in size yet again, with only modest growth in their services operations team. "We have a company-wide objective of 'growth without growth,' and we've been able to meet that objective handily thanks to Changepoint," said Foote.

The company has begun implementing Changepoint for revenue recognition. "We are implementing each new piece of Changepoint very methodically," explained Foote. "One of the nice things about Changepoint is its modular format. It allows us to turn on functionality within a division or a location, allowing us to do proper care and feeding of our users. We aren't forced into a situation where we have to implement to 2,500 people all at once."

More than 80 percent of Presidio's technical consultants and sales engineers are now carrying smartphones and tablets, and all staff members are equipped with notebooks. "We always say we are one Christmas or one Father's Day away from 100 percent mobile enablement," chuckled Foote. "We're now planning our upgrade to Changepoint 2012 and are looking closely at the mobile device and expanded browser support this release offers."

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RESULTS

Ten years ago, when Bob Foote first selected Changepoint for time and expense tracking for his small company, he had little knowledge of the tremendous growth and success that lay ahead for Presidio. The initial three systems he selected and implemented for PSA, enterprise resource planning and dashboarding remain in place today. "We are compelled to revisit our core solutions with each acquisition, to make sure they still best serve our business needs and can support our growth. Every time we looked at the other options, we found them lacking. When we initially selected Changepoint, we chose it because we felt it was a system that could grow and mature with us as our business grew. It has never disappointed."

Kennedy and Foote both concur that Presidio's relationship with Changepoint goes far beyond the solution. "We have the best of both worlds," boasted Kennedy. "We benefit from a very strong, mature PSA solution, but also from a very strong relationship with the Changepoint team. It's a beautiful thing that I can go to a user conference and sit face to face with the people that are the decision makers. And they listen and respond. It's a wonderful relationship that is only going to get better."

"As we have grown, as our users have matured, and as our processes have matured, we have always been able to turn to Changepoint for support," said Foote. "It's allowed us to achieve efficiencies in our business and conduct it in a highly consistent way, even in the midst of nine acquisitions and massive growth."

ABOUT CHANGEPOINT

Changepoint manages critical customer business processes allowing technology services and IT teams to deliver more customer value, make smarter business decisions, and achieve new efficiencies, while operating with strong financial acumen. Recognized year over year as a market leader, Changepoint's professional services automation and project portfolio management software is relied upon by leading technology companies, and service focused IT organizations worldwide. Changepoint is headquartered in Toronto, Canada.

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