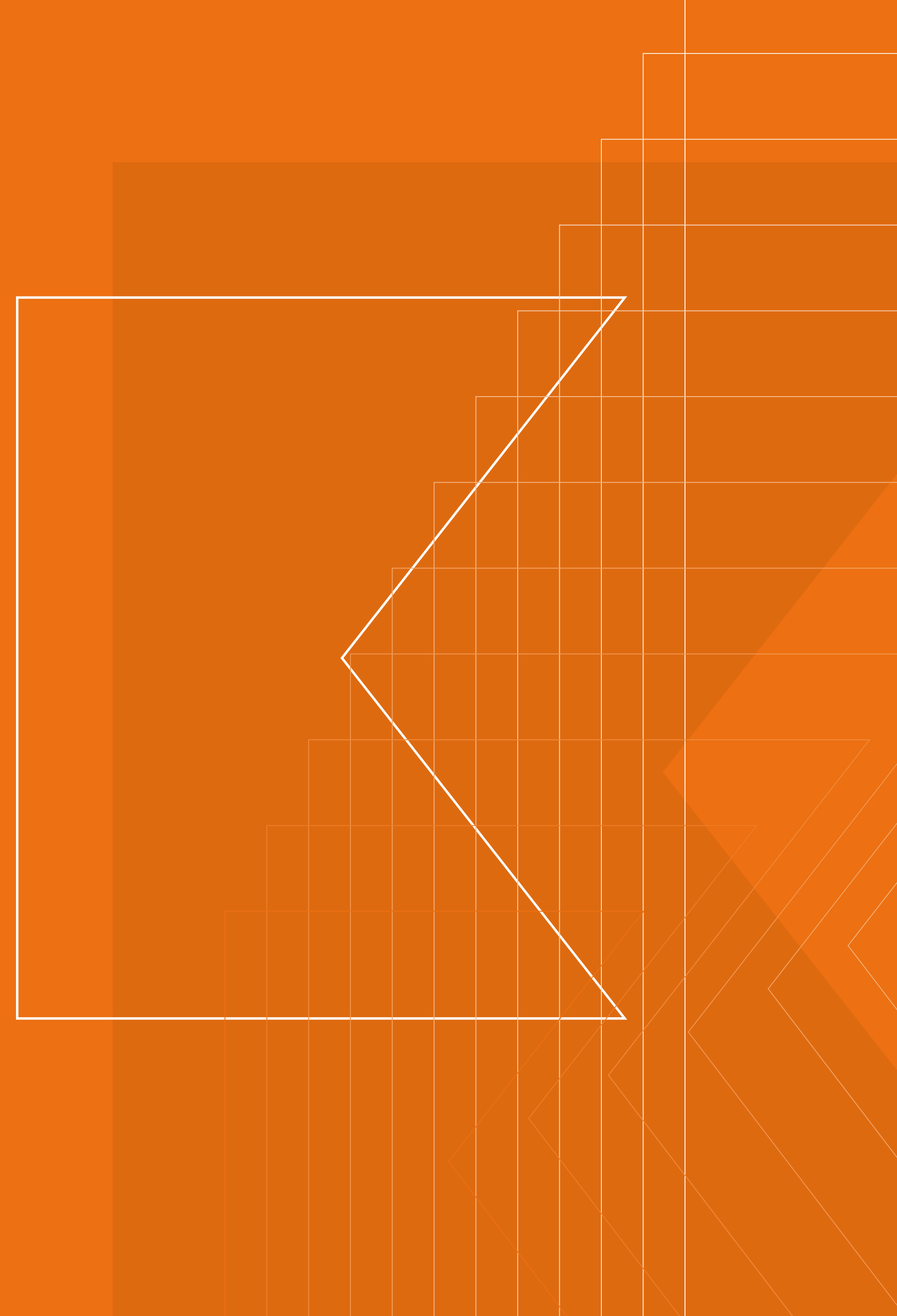


**Kantata**

# From Chaos to Clarity: Success Stories in Resource Optimization



# Introduction

A professional services organization is only as strong as its resources, but issues arise when those resources are idle, overworked, or poorly tracked. That's why having the visibility to optimize your resource capacity planning and manage your workforce efficiently is vital for every business. If your company struggles to manage its team members' skills or balance project loads, you may risk losing productivity and revenue. Not an ideal situation. According to Forrester Research, 59% of leaders deal with these issues and find it challenging to forecast resource needs in advance.

Ineffective capacity planning can also lead to problems beyond poor productivity. Many professional services organizations that lack resource visibility experience poor retention rates because they fail to understand their teams' engagement and satisfaction, resulting in low staff morale and high turnover rates. This often coincides with inadequate skills matching against demand. Businesses without the right insights struggle to identify gaps in their teams' capabilities, making it difficult to hire for the right roles and implement effective training programs to meet service requirements. You can't win a game of chess without knowing how to move the pieces.

Enter Kantata, a next-generation PSA solution purpose-built for the needs of professional services organizations. Kantata enables its customers to manage resources in real-time, forecast more accurately, and make better business decisions:

- **Utilization:** Improve utilization with accurate bench information, leveraging available resources and preventing burnout of overworked employees.
- **Build the best team:** AI-based optimization algorithms find specific skills and available resources across projects and roles.
- **Global Resourcing:** Share resources across geographies and segments to create an interconnected company without restrictions.
- **Collaboration:** Coordinate handoffs between resource and project management departments for smooth and efficient work.
- **Employee Engagement:** Allow resources to express interest in specific projects, helping to foster team growth and employee satisfaction rates.

These are just a few of the ways in which Kantata supports improvements in resource capacity planning and optimization, serving as a versatile tool for your professional services needs. The following whitepaper explores detailed accounts of how Kantata customers have found success by solving their biggest resource visibility challenges.

# Table of Contents



## From Scramble to Streamlined: How Codal Nearly Doubled Billable Utilization With Kantata

Codal experienced an 82% increase in employee billable utilization, a 90% reduction in time needed to generate invoices each month, and much more after leveraging the real-time data and analytics made possible by adopting Kantata.

**PAGE 04 →**



## Toyota Connected Reduces Bench Time Below 1% With Kantata

Toyota Connected reduced bench time for their teams to less than 1% alongside a 25% increase in timesheet adoption, fostering agile business strategies based on dependable, in-depth data.

**PAGE 07 →**



## TeleTracking Increases Billable Utilization by 37% With Kantata

Teletracking increased billable utilization by 37% as well as an 18% increase in total billable hours to date, supercharging their company's possibilities for continued success in software services.

**PAGE 10 →**

Continue reading to discover more about how Kantata is helping professional services organizations around the globe achieve optimized capacity planning and so much more. Spoiler alert: it's pretty awesome.

Success Story 01

# From Scramble to Streamlined: How Codal Nearly Doubled Billable Utilization With Kantata

**INDUSTRY**  
IT Services

**HEADQUARTERS**  
Chicago, Illinois

**COMPANY**  
Codal

**WHAT KANTATA REPLACED**  
In-house solution, Tempo, and other  
tools and manual processes

[See Full Success Story](#) →



# The Challenge

Codal had an opportunity to improve its growing operations, particularly when it came to resource allocation and visibility into project statuses. To support the company's rapid growth, Codal's leadership team aimed to implement a cohesive system that would provide precise knowledge about resource allocation to product managers, ensuring an optimal utilization of resources, and no end-of-month surprises in financials. "Key information was buried in spreadsheets, and the budget for a project would look fine in one and be over-budget in another, for example," said Erin Keeley, Global Operations Manager at Codal.

"When we won a new deal and it didn't look like someone was available, we would go out and hire somebody, resulting in additional costs and underutilized staff."

Codal's initial attempt to break the organization's reliance on spreadsheets involved in-house developers trying to build their own professional services automation (PSA) solution. However, this approach proved to be complex and time-consuming, diverting valuable resources from their core business activities.

# The Solution

Implementing Kantata provided Codal with a robust solution to these challenges. The platform's flexibility and integration capabilities were key factors in their choice. Keeley noted, "The reason we chose Kantata was because it gave us flexibility that many ERPs we evaluated couldn't provide. Where those involved the business going 'all in', Kantata was adaptable and could work alongside key tools we were using." Kantata integrated seamlessly with their existing tools like Salesforce, JIRA, and QuickBooks, centralizing project and resource management. The implementation allowed Codal to consolidate its systems, improve configuration, and provide better visibility across projects.

Introducing Kantata has not only streamlined Codal's processes but also provided real-time data and analytics, which were crucial for decision-making and forecasting. "Within a year of adopting it, it's become such a centralized aspect of every management meeting," says Keeley.

"Everyone is already seeing the true value of moving from multiple systems to Kantata."

# The Results

## 01 Increased Billable Utilization

Kantata has provided Codal with the visibility needed to monitor and manage employee utilization effectively. Since adopting Kantata, Codal has reduced non-billable hours by 25% and nearly doubled employee billable utilization.

“Kantata has given us increased visibility into our employees’ current and future availability. We meet weekly to review underutilized employees and it’s extremely satisfying to see the number of available employees continue to decrease week to week”

Erin Keeley, Global Operations Manager, Codal

## 02 Improved Resource Management Discipline

With Kantata, Codal no longer rushes to upskill or hire a resource when a qualified resource is actually available. The visibility provided by Kantata has enabled Codal's resource manager to make informed decisions about allocations, ensuring that resources are used efficiently.

## 03 Visibility Drives Alignment

Transitioning from managing project information in spreadsheets to the centralized reporting provided by Kantata has been transformative for Codal. Now, everyone at Codal has access to the same key project information, significantly improving efficiency and collaboration across the team.

## BENEFITS

- ✓ Improved resource allocation process eliminates costly staffing oversights
- ✓ Increased visibility of critical project metrics reduces budget overruns and month-end surprises
- ✓ Streamlined and automated time tracking and invoicing processes

82% ↑

increase in employee billable utilization

90% ↓

reduction in time needed to generate invoices each month

Success Story 02

# Toyota Connected Reduces Bench Time Below 1% With Kantata

**INDUSTRY**

IT Services

**HEADQUARTERS**

U.S.

**COMPANY**

Toyota Connected  
North America

[See Full Success Story](#) →

# The Challenge

Toyota Connected North America, based in Plano, Texas, leads the development of Toyota's cloud-based digital Connected Mobility Intelligence Platform. Toyota Connected leverages ethical AI to develop innovative mobility solutions, aiming to redefine standards in the automotive industry.

Having worked with inefficient spreadsheets for resource tracking and skills matching, Toyota Connected North America sought a unified "source of truth" to streamline organization-wide data and improve decision-making. TCNA turned to Kantata to help its leadership and engineering teams make better decisions, faster.

# The Solution

Kantata brought a new level of clarity to TCNA's workforce's skills and availability, igniting the ability to match the right skills with the right projects at the right time. "Kantata enables us to have those conversations we didn't have, or we couldn't have, before," said Dave Knapstein, Strategic Workforce Planning Manager at TCNA.

"It's the tell-all system that we reference to tell us how we're performing in the organization across our projects as well as where our resources are on those projects."

In addition, Kantata boosted workforce management through consistent timesheet use. "We're getting the best out of our resources, not overworking them, and we're maximizing our availability," Knapstein said.



# The Results

## 01 Near-Extinction of Bench Time

Initially, TCNA had a cloudy picture of bench time. Kantata brought transparency with accurate insights on resource availability and skills, revealing that about 15% of resources were typically on the bench. Kantata has radically improved that.

“After utilizing Kantata and ensuring the data was accurate, we’re now down to less than 1% on the bench.”

## 02 Enhanced Forecasting

Adopting Kantata has empowered TCNA to precisely forecast project durations. “We can better forecast how long something will take us because of the data we are able to enter in the system,” said Dave Knapstein, Strategic Workforce Planning Manager at Toyota Connected North America. This forecasting accuracy led to better planning, resource allocation, and, ultimately, more efficient project execution. Knapstein concluded, “Kantata has become a source of truth for our organization and the hub of our systems. We’re constantly in the system, daily, having conversations about our organization, our staffing, and our projects.”

### BENEFITS

- ✓ Enhanced data accuracy accelerates sound business decisions
- ✓ Increased transparency in skills and availability boosts efficiency
- ✓ Improved historical data capture refines project and business forecasting
- ✓ Precise data fosters agile business strategies

25% ↑

increase in timesheet adoption

>90% ↓

reduction in resources on bench

Success Story 03

# TeleTracking Increases Billable Utilization by 37% With Kantata

**INDUSTRY**

Software & Hi-Tech

**HEADQUARTERS**

Pittsburgh, Pennsylvania

**COMPANY**

TeleTracking

**WHAT KANTATA REPLACED**

Excel, Microsoft Project

[See Full Success Story](#) →



# The Challenge

TeleTracking provides patient flow automation solutions to the healthcare industry to solve today's pressing hospital needs. Their mission is to optimize workflow and improve timely patient care.

TeleTracking needed a resource management solution that could provide support in several crucial areas, including their time tracking practices, resource utilization and forecasting capacity. Their search for a solution led them to consider OpenAir PSA before they found Kantata.

# The Solution

## Sales Pipeline Visibility

Kantata enabled long-term scheduling and insights into both in-office and remote employees to reduce benchtime. These insights into upcoming project demands help make the most of each resource.

## Detailed Utilization Reports

TeleTracking dealt with frequent time entry miscategorization and inconsistent utilization definitions, which made it difficult to understand employee utilization and needs.

## Accurate Time Tracking Capabilities

Kantata helped TeleTracking overcome the limitations and unclear requirements of their previous systems, which had led to inaccurate utilization, lower compliance rates and inaccurate project budgets, which were compounding other challenges.

# The Results

## 01 Massive Gains in Resource Utilization

Adopting Kantata has helped TeleTracking achieve 100% compliance with their time tracking policies, ensuring all team members are reporting correctly. This has resulted in TeleTracking experiencing a 37% increase in billable utilization between 2018 and 2019. In addition, the company has benefited from improved Work-in-Progress (WIP) accounting through Kantata.

## 02 Long-Term Forecasting for Capacity

TeleTracking has utilized Kantata's Unnamed Resource Feature to allow named resources to be scheduled closer to actual events and has used Resource Center to assure all resources both remote and on-site are scheduled effectively. In addition, Insights Reports support real-time, objective capacity planning.

"Being able to finally have this ecosystem with Kantata where we could look at our resources as a whole and see where they were deployed, what they were focused on, what skill sets we had available, balance out the workload for our resource pool and the forecast was a huge opportunity."

Jane Everett Goering, Resource Manager, TeleTracking Technologies

### BENEFITS

100%  
time tracking compliance

13% ↑  
increase in hours in 2 weeks

18% ↑  
increase in hours to date

37% ↑  
increase in billable utilization



# About Kantata

Kantata takes professional services automation to a new level, giving people-powered businesses the clarity, control, and confidence they need to optimize resource planning and elevate operational performance. Our purpose-built cloud software is helping over 2,000 professional services organizations in more than 100 countries focus on and optimize their most important asset: their people.

Learn more about how Kantata can solve your biggest resource visibility challenges, delight your customers, and empower your employees all with one seamless solution.

[VISIT KANTATA.COM TODAY](https://www.kantata.com) →