



Convergys Marketing Team Tracks Projects' Value and Reduces Meeting Time with Clarizen

[Convergys](#) (NYSE: CVG) is a global leader in relationship management, delivering a broad range of customer and human resources solutions. Its offerings include the technology, business analytics and consulting services that create valuable relationships between Convergys' clients, their customers and their employees. Headquartered in Cincinnati, Ohio, Convergys employs nearly 75,000 employees who serve clients in more than 70 countries. Convergys has been named a Fortune Most Admired Company for nine consecutive years, and more than half of the top 50 Fortune 500 companies are Convergys clients.

Convergys' Brand Marketing group consists of 20 employees who serve four other groups within the Corporate Marketing department by providing web, creative, and lead management services – as well as by maintaining an online database of RFP and sales tools. The Brand Marketing team wanted to track how other groups were using its services. Lorena Harris, Director of Brand Marketing for Convergys, said her department was actively serving the needs of the rest of the marketing and sales staff, but she had no formal way to track project volume or resource utilization. Additionally, she wanted to report on the volume and quality of that work to senior management, but doing so was difficult without a project management system.

Lorena asked Senior Marketing Associate Sandi Rose to conduct a thorough solution-assessment process, which began when Rose interviewed her project managers to determine exactly what each needed in a solution. The top three features Convergys team leaders needed were cascading timelines, customizable layout and a dashboard view. The company looked at many tools, including those offered by RoboHead and Basecamp, but ultimately chose Clarizen because it met Convergys' demands at the most competitive price. Additionally, the project management team scored Clarizen's interface 10 out of 10 with regards to ease of use.

Convergys implemented Clarizen in April 2009 and quickly realized the technology offered more opportunities for managing project lifecycles than Convergys had even known it needed. "If we were to go back now and list our top three requirements for a work management solution, we would search for other things," said Rose. "Because of Clarizen, we have discovered different needs and different ways the tool can help us."

Convergys recognized a huge and unexpected benefit when the corporation migrated from Lotus Notes to Microsoft Outlook, which integrates with Clarizen, and empowers team members to report their progress on projects directly from their inbox. Since project status and related data is securely shared based on each user's role and permissions, team members access only the projects they are working on, and can update them without having to tap into the overall work management platform.



Convergys realized many benefits from the Clarizen implementation. The Brand Management group saw a reduction in meeting time thanks to Clarizen views, which not only details where projects stand, but also shows which staff members are overloaded and which might have bandwidth to take on a greater workload.

The Convergys Brand Marketing team used Clarizen templates to formalize and document many frequently-repeated processes. Most notably, the team reduced the number of steps it takes to produce Webinars, one of its major value-added services to the rest of the marketing department. "It used to take at least eight weeks or longer, and now it takes only six weeks to create a Webinar," said Rose. "The Clarizen templates helped us remove 50 percent of the steps in these projects."

As she became more knowledgeable about Clarizen's benefits, Lorena Harris became an advocate for adoption across the Marketing organization. Though challenged by her staff's resistance to project management best-practices and documentation, Harris perseveres in reinforcing the behaviors because she is confident that once employees embrace them, they will realize how much more efficient and effective they become. "Additionally," says Harris, "rigorous project management allows us to identify areas of risk such as bottlenecks and resource overutilization."

"Once people are in the system and they understand its value, we are fine," said Rose. "They like it, they are on the ball, they are on deadline, and nothing slips."