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DKI is a digital marketing agency that works with pharmaceutical companies to produce interactive, informational programs that help educate patients and caregivers about specific diseases, conditions, and their treatment. DKI has 45 employees and runs an average of 25 projects at any given time.



Naftali Goldsmith is Director of the Project Services Department, which includes five project managers and coordinates resource usage across the organization, including creative, technical, and account team members. Naftali has direct responsibility for managing his own projects and is also responsible for the coordination, planning, and execution of all the projects in the organization as well as for ensuring that the project managers are running their projects on time and on budget.

When Naftali joined DKI, the company was running desktop implementations of MS Project. The project managers were building out their own plans, schedules and resources on their own desktops and managing them individually. They would print out the tasks and schedules, deliver them to the team and within a day or two, once the plans were out of date, repeat the same activities with updated information. The data on which they were basing their resource decisions and project deadlines was inaccurate before it was even delivered.

The DKI project management team would spend hours each week with a desk full of printed project and resource plans, trying to juggle all the resources on all the projects. With this type of manual resource allocation, it was impossible to have real-time visibility of the resources or to ensure that they were properly assigned to tasks, were not over loaded, and were being utilized efficiently. The project managers also found it almost impossible to anticipate upcoming spikes in resource load for particular types of agency resources, like copywriter or front end developer.

When Naftali was first hired, it was his mandate to bring transparency and accountability to the organization. He quickly made the case to management that in order to effectively work in a multi-project environment, DKI needed to adopt a robust, usable tool that would allow for project collaboration and enable the project managers to share pooled resources and prioritize projects and tasks across projects.

Conceptually, Naftali knew that he was looking for SaaS solution but besides that, he started his research from scratch. After looking at solutions at all levels of the complexity scale, he felt comfortable selecting one of the players in the middle that had robust project management



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features, but was not overloaded with a crowded interface, complicated usability, or complex data paradigms.

Another consideration in choosing a platform was the type of users that would be using the platform. Not only would his project managers be using the platform to manage their complex projects, but so would the copywriters, designers, and other less technical users who would need a clean and easy interface to encourage them to adopt the platform. For DKI, the platform had to look as good as it worked. These factors, in addition to the help of Clarizen's sales and customer success teams, gave DKI confidence that Clarizen was the right choice for their organization.

"If I were to dream up my own project management tool, I would probably wind up with something like Clarizen. It just makes sense to me," said Naftali. "I am a complete convert to the way Clarizen defines milestones. I now use Clarizen's milestone templates to create project estimates, and their new Project Roadmap widget brings it full circle by giving me and the team full visibility into where each milestone stands."

Now that Clarizen is implemented across the project management team, the project managers have an instant view of what is going on at any point in time and can quickly and easily pinpoint possible issues, bottlenecks, or delays before they happen. "There is a fundamental, positive shift in our ability to be accountable for the projects we manage," said Naftali.

"Our main motivation for moving to a new project management platform was the need to manage our resources in an effective way. The fact that we can now predict the availability of our resources and assign accordingly is a strong justification for the Clarizen implementation," said Naftali. "I don't want to overstate the case, but Clarizen has been central to our evolution as a project management department in a fast paced, agency environment."

"One thing that we didn't anticipate is how Clarizen would actually impress clients," said Naftali. "We recently met with a new client and explained how we would use Clarizen to run the project. My exact words were 'Our project management team is driving a Lexus'."

Now, Naftali says that he can't imagine being responsible for so many projects without Clarizen.