

## Clarizen Helps Identropy Centralize All Business Processes In One Online Platform



Identropy is an Identity & Access Management services organization. Identity & Access Management (IAM) consists of the business processes and technologies that manage the identities in a company's infrastructure. When properly applied, it proves invaluable to an organization's capabilities to demonstrate adherence to regulatory compliance laws.

Identropy has three lines of business: Advisory Services, Implementation Services and Managed Services. As most young companies, Identropy was seeking ways to differentiate their business services. As a part of that process, Identropy began its efforts on instituting best practices, a specific implementation methodology, and incorporate the right toolsets to provide transparency to their clients regarding the progress of projects they were delivering.

Clint Finch, Project Manager (PMP), joined Identropy and inherited a rather large portfolio of projects of varying size and budgets. After trying to keep track of it, it became clear to Clint and to his management team that tools and processes were necessary to grow the company to the next level.

Since Identropy is a Solutions Provider that has embraced the cloud, Clint immediately began searching for a SaaS-based project management tool. After investigating many tools, Clint narrowed the choice down to AtTask and Clarizen.

*"Between @Task and Clarizen, we liked Clarizen's aggressive policy towards product updates and introduction of new features. And, quite honestly, we liked the way Jackie (On Clarizen's Sales Team) worked to win our business," said Clint. "Jackie really made us feel like Clarizen wanted our business and would support us fully once we came on-board. She has done a great job of reinforcing that impression since we signed. We've been very happy since coming on-board and have no regrets about choosing Clarizen."*

The next challenge after choosing which tool to use was encouraging his team to use it. Not only does the internal Identropy team of 16 employees use Clarizen on a daily basis, but Identropy gives a full license to each of their customers so that they can be fully involved in the project and tasks related to their specific project. Clint felt that adoption went relatively easily because the solution proved itself simpler and more productive than their previous tools, Microsoft Project and Microsoft Excel. He said that with some basic tutorials and simple introduction, the team was up and running in no time.



Now Clarizen is used across the organization in all three lines of their business. They are working to create the processes necessary to better utilize the tool such as a series of templates and workflows that can simply be copied and pasted when new projects are accepted.

When a typical Statement of Work (SOW) comes in, Clint starts a new project in Clarizen and lists all the tasks necessary for that project and the amount of time they will take. He then adds the resources required for each task, defines their billable rates and adjusts their availability to build up a complete schedule to ensure that the budgeted hours match the SOW. Once Identropy implements the upcoming Clarizen Salesforce.com integration and finalizes their template structure, they hope to be able to use the two to estimate project length, budget and cost before a quote is sent as predictors rather than indicators.

Identropy uses Clarizen's timesheet module as the basis of most of their process. Every employee updates their timesheets, what they have been working on and how long they spent. With each resource having an assigned billable rate, whenever an employee updates their timesheet, the overall costs and budgets on the project are updated. This information is then transparent to management and the finance department who bill their customers based on those hours.

*"Everything is based on timesheets now so our team doesn't have to do any double entry," said Clint. "But the true benefit is that now we don't over allocate our resources. We have so much work and not enough people to do it so it is critically important to use that we effectively manage our resources so we don't overuse the precious resources we have."*

*"Clarizen gives us the ability to track our projects, how much money we are making or sometimes not making, if we are behind or ahead of schedule and the availability of our resources for all our lines of business, in one tool!" said Clint. "This is a tremendous boon as far as we are concerned and the real benefit of working with Clarizen."*