



White Paper

Improving Project Success: Managing the Client

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Introduction

Do you have clients that are consistently late meeting their responsibilities, but still hold you to the original schedule? Are your most difficult projects the ones where the clients are not meeting their obligations?

We are all well-versed in the classic three-dimensional attributes of projects: time, budget and responsibilities. We also know, all too well, the problems that can come along with servicing a challenging client who does not meet their responsibilities according to the project schedule. When the client is in charge of action items that are blocking other action items, it is a serious problem. This problem is compounded when we are expected to deliver the project on time despite these blockages. If we've done our due diligence, but our client consistently cannot or will not fulfill his end of the project agreement with regard to approvals, design meetings or information delivery, then he shouldn't expect that his tardiness with these items will NOT impact the schedule.

Further, projects which fall behind in schedule are the ones that are most likely to also be over budget. Trying to recoup extra costs from clients due to their own delays is problematic at best.

Are there tools available to manage the client, help them meet their responsibilities, and minimize the impact their delays might have on project due dates?

This white paper will address the use of FourthLink's scheduling and forecasting tools to help manage your clients and help minimize their disruption to project schedules. By doing so, we will also show how to bring more projects in under budget and improve your profitability.

Step 1: Identifying/Assigning Client Responsibilities

Many professional services firms find themselves behind schedule and over budget due to their clients' failure to meet due dates and obligations.

With FourthLink's RPM Client Portal, project managers can assign tasks from the project plan directly to clients. Clients are granted access to view upcoming tasks and can enter their progress and any outstanding issues they may be encountering.

There is an old adage that says, "You can't manage what you can't measure."

A unique feature available in FourthLink Resource Process Manager (RPM™)—and *not* available in other Project Management software tools—is the **ability to assign tasks to clients!** How can you expect to hold your clients accountable for their responsibilities if there is no way to assign tasks to them from within your project management software?

With this feature turned on, your project management team can identify which tasks are the responsibility of the client to complete.

Here is a screen shot of a FourthLink project plan showing tasks assigned to clients:

Seq	WBS	Activity	Task Name	Duration	Start	Finish	Const Type	% Complete	Resource Assignment
			Project Plan	63 days	Tue 01/15/08	Thu 04/10/08		6%	
1	1	IMPL	Implementation Services	66 days	Tue 01/15/08	Thu 04/10/08	ASAP	7%	
2	1.1		Launch Meeting	1 day	Tue 01/15/08	Tue 01/15/08	ASAP		SBA
3	1.2		Management Overview Training	2 days	Wed 01/16/08	Thu 01/17/08	SNET		SBA
4	1.3		Management Overview Training - Client Review	1 day			ASAP	0%	CLI
5	1.4		SetUps	1 day	Thu 01/24/08	Thu 01/24/08	FNET		
6	1.5		Masking Review	2 days	Fri 01/25/08	Mon 01/28/08	SNET		
7	1.6		Pre Conversion On Site Support I	4 days	Wed 01/30/08	Mon 02/04/08	FNET		FPH,HJP,JDP
8	1.7		Pre Conversion On Site Support II	29 days	Tue 02/04/08	Thu 03/10/08	FNET	50%	BW,HJP,MRC,RS
9	1.8		On Site Support First Month End	3 days	Tue 04/01/08	Thu 04/03/08	FNET		
10	2	TRAIN	Training Services	11 days	Tue 02/04/08	Tue 02/11/08	FNET		
11	2.1		Billing Manager	2 days	Tue 02/05/08	Wed 02/05/08	FNET		FPH
12	2.2		Accounts Payable	2 days	Tue 02/12/08	Wed 02/13/08	FNET		SBA
13	2.3		General Ledger	1 day	Mon 02/18/08	Mon 02/18/08	FNET		
m	2.4		Milestone Approval Test	1 day			ASAP		
15	2.5		Training - Client Review	1 day			ASAP		CLI

Step 2: Providing Project Access to Clients

In order for us, as project managers, to monitor the progress of how clients are doing on their assigned tasks, we need to provide a method for clients to identify their responsibilities and provide us with updated information.

This is accomplished through the [FourthLink Client Portal](#).

Each client firm is given a unique, secure login which provides access to their project or projects.

The screens look like this:

Project Summary:

Active Projects				
Active Projects		PullmanFirestone, LLC		
Show tasks for: <input type="text"/>				
Project	Description *	Project Manager	Start Date	End Date
<input checked="" type="checkbox"/> CON.0041	Accounting Software Installation (CR)	Davis, James	1/15/2008	4/10/2008
<input checked="" type="checkbox"/> CON.0065	New Project Intake	Davis, James	4/1/2008	6/27/2008
<input checked="" type="checkbox"/> CON.0071	Report Enhancement Implementation (CR)	LeSeur, Keith	6/2/2008	6/13/2008

Expanded Task Display:

Project	Description *	Project Manager	Start Date	End Date																																										
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Client Update Window:

Maintain the Status of the current Task

Accounting Software Installation

Training - Client Review [Send Email](#)

Percent Complete: Completed:

Actual Start Date: Plan Start: _____

Actual Finish Date: Plan End: _____

Alert Status:

Status Comments:

Please note only one status comment is retained in history.

With updated data provided both by your own internal resources and our clients—for tasks and deadlines for which they are responsible—we can better maintain overall schedules and due dates.

Step 3: Improving Client Communications

Poor communication often leads to misunderstandings between Client and Project Manager.

With FourthLink tools, you will be armed with the reports and information to effectively communicate about project status and budget.

Oftentimes, the client is oblivious to the impact that missing a deadline can mean on an overall project schedule and budget.

With FourthLink RPM, you will now have the reports and graphic tools to sit down with the client and show specifically where bottlenecks will occur as a result of their inaction and where additional charges to the client might result. (A sure motivator to action!)

The *Upcoming Tasks* dashboard and the shared documents workspace, which are provided as part of the RPM Client Portal, will further improve communications. Clients will be able to plan better for upcoming activities requiring participation by their staff. The project team can have a common, accessible repository for approval documents, system documentation and training outlines.

The Costs of Client Delays

A mid-sized (\$15 million/yr revenue) professional services firm loses a minimum of \$50,000 each year due to the inefficiencies created as a result of poor communications with their clients.

Let's examine what a 50-person professional services firm that completes seventy, 1000 hour projects in any given year might be losing in revenue from missed client deadlines:

Let's say that on half of these projects the client misses a key deadline which causes one day of lost time (8 hours). This could be time that cannot be re-booked to another client or extra time required on the current project that we cannot bill for. With this conservative measure of one missed day on one half of its projects, our hypothetical firm is **losing \$56,000 each year!** (8 hours x 35 projects x \$200/hr).

If your firm is larger, or you have more projects, you are probably losing *more time* due to client irresponsibility, and your lost revenue is likely *even higher!*

FourthLink's Resource Process Manager™

FourthLink provides an integrated software solution which simplifies the scheduling process, streamlines communications, enhances time capture, helps improve utilization and provides reports with accurate, actionable information.

Designed as an integrated solution, FourthLink's Resource Process Manager™ is a centralized software application which assists professional services firms that have become frustrated with the cost of poor communications both internally (with internal resources) and externally (with clients and contractors) and the limits this imposes on growth and profitability.

Assign Tasks to Clients

With RPM, your project team can easily assign tasks to clients for fulfillment and updating.

Providing Client Access

With RPM's Client Portal, your clients can easily view upcoming tasks to assist their planning; update task status on items they are responsible for; and view and share documents.

Reduce Costs Associated with Client Delays

With RPM you will be able to better manage your clients and resources. Actions are taken in real time, minimizing frustrating follow up and delays, and reducing downtime and improving utilization.

Provides Timely, Actionable Reports

FourthLink provides a common platform for resource and project data. Everyone views, updates and shares information in real time from any Internet-connected computer. FourthLink provides the tools needed to keep planners informed of skills, training and special qualifications as they grow and change, and firm management with the reports they need to react swiftly in order to enhance profitability and accelerate growth.

About FourthLink, Inc

Founded in 2006, FourthLink, Inc. has established proven leadership in the demanding world of resource scheduling, delivering enterprise applications to the foremost professional services firms. The company has gained a reputation for commitment to service, combined with leading-edge technical expertise.

FourthLink's products are written using industry standard tools, allowing customers to receive superior support, achieve rapid deployment and swift response to changing needs.

To find out more about FourthLink Resource Process Manager™ visit www.fourthlink.com, call 617-597-1720, or email us at info@fourthlink.com.

