

## In-Depth Training Provides Deeper Engagement With System

### Background on Parcel Design

Established in 2004, Parcel Design is an award-winning brand strategy and communication design firm. The agency designs in all dimensions—identity systems, print, digital, packaging, new media and story development—and has become known for creating highly integrated, tactile solutions with a strong sense of character.

**Parcel**

Industry: Brand Strategy & Communication Design  
Size: 15 Employees  
Location: Toronto, ON

### Summary of Challenges Prior to Function Point

- There were a number of employees at Parcel using Function Point for timesheets only, and the company's principal wanted to review the value they were receiving.
- Staff did not know if they were using Function Point in the most effective way.
- The process of creating estimates and invoices had become unwieldy, with unnecessary service groups being added.

### Summary of the Benefits of Training with Function Point

- Parcel's staff had the opportunity to ask questions one-on-one and learn how to improve the ways in which they use Function Point.
- Employees were shown how to customize their dashboards based on the information they wanted to see.
- Function Point gave suggestions on how to simplify certain processes, improving efficiency.
- Employees had an opportunity to update their knowledge of current processes, as Function Point is making constant updates and improvements based on client requests.
- Industry information was shared and discussed, changing the way Parcel looks at productivity.

## Executive Summary

Parcel has been using Function Point as their integrated project management system for the last seven years. Julie Mitchell, Partner and Founder of Parcel, originally chose Function Point for a number of reasons; the software is specific to the creative agency industry; the system was recommended by a friendly competitor; and the company needed seamless workflow management software that could be accessed online. In 2014, the company entered into high-level training sessions with Marc Wilson, Senior Consultant at Function Point, to review their level of engagement with the system.

## Results

Parcel Design has used Function Point as its project management system for seven years, and was utilizing most areas of the software. The company values the system's ability to track entire projects—from contacts, estimates and purchase orders, through to invoices and reconciliation. The software also assists the team with time tracking, managing workflow, and viewing accurate data quickly. Over the years, almost every process in the company has been improved and simplified by Function Point.

However, Parcel questioned whether their staff was using the software in the best way possible. Function Point suggested their team take part in onsite training sessions to review how they were using it, and learn what they could do to better use the system, and increase productivity.

Marc Wilson set up a tight focus for the Function Point training sessions that consisted of breaking down the day to target different areas of the system, and then bringing in the appropriate users for those modules for training. The sessions were also flexible in examining different areas of use, depending on the needs of the staff. For example, Julie Mitchell required information that's

relevant to being a partner in the business, and so Wilson changed her Function Point dashboard to reflect that. Together they spent time looking at concrete examples on how to use the software to determine productivity. Wilson shared industry knowledge about productivity rates, and how it can be reviewed at the employee and client levels. Now, Mitchell feels she has a higher level of comfort using the Function Point system.

The training sessions included in-depth demonstrations of the software, and opportunities for staff to participate in Q & A. Long-time staff were able to get feedback on how they used Function Point, and reported that it was helpful to learn about new advances, and that they felt more confident knowing they were using the system successfully. One staff member also noted that the training process had motivated her to become more involved in system advancements, because Function Point is such a useful and accurate tool in their day-to-day project management.

One of the challenges Parcel had was their monthly invoicing process, which had grown to include many service groups, and had become inefficient. During the training period Wilson showed staff how to reduce the number of service groups, create multiple dockets and then batch invoice, making the process more streamlined.

Once the training sessions were completed, Mitchell noted that she felt she had a deeper engagement with the system and a better understanding of how to analyze the company's productivity. And, because businesses do not typically have face time with their software providers, one of the added bonuses of the tutorials was the chance to make a face-to-face connection between the team at Parcel and Function Point.

## Next Steps

To find out more about what Function Point can do for your business visit [www.functionpoint.com](http://www.functionpoint.com), schedule a **free demo**, or call 1.877.731.2522.

## Function Point

Function Point Productivity Software Inc. (Function Point) is a web-based software as a service (SaaS) company, and is located in Vancouver B.C. The company was founded in 1997 and is a worldwide leader in CRM, time tracking, invoicing, task, project and workflow management software for marketing companies, advertising agencies, design firms, and interactive web development companies with over 9000 active users worldwide.

