



# CHARTER UK

## **SME Charter UK manages product development and client projects with Innate software.**

*Building on more than 12 years of customer management experience and a passion to deliver best-of-breed customer service solutions, Charter UK provides a comprehensive Customer Experience Management (CEM) software application to companies worldwide. Charter Continuum is a solution for customer-centric companies with a high volume or a complex level of contact. Interactions which may be as simple as logging a complaint and recording a change request or as complex as account adjustments, sales enquiries and compensation claims, may be easily and efficiently managed by the flexible workflow within Charter Continuum.*

*So with its 25 plus staff, Charter UK develops software products, and customises and implements them for each customer. They run everything as a project.*

### **Making Charter UK a successful business.**

It goes without saying that like any business, Charter UK needs excellent products, good marketing and a real client focus to succeed. It also needs the internal controls and systems to use its skilled resources effectively, complete every client project on time and budget, track the profitability of each project, and to Invoice correctly and quickly.

As an SME, the essential controls needed are the same as for large businesses, with the added requirement that the limited admin resource

available to an SME means that it is doubly essential that the systems are simple and easy to use.

### **Situation before Innate**

Prior to installing Innate, Charter UK had four separate systems for resource planning, project planning and control, recording actual time spent and providing data for accounts and billing. So resource allocation against projects was a laborious and difficult process, and bringing the data together for accounting and billing was time-consuming and prone to error.

Charter UK's requirements were wide-ranging, covering the whole business. They needed to:

1. Improve the visibility and ease of resource allocation.
2. Incorporate their MS Project plans to the detail agreed with clients.
3. Provide a timesheets capability easily used by all staff.
4. Dramatically reduce the effort required to provide performance and earned value reports for the accounts.

And they chose Innate software to help them do it.

### **The Innate solution for Charter UK**

Charter UK has implemented Innate Resource Manager for all staff on software development and billable projects for customers and Innate Timesheets for all staff. Each module shares the same database and the whole system is synchronised with project plans in MS Project for the larger projects. In addition, Innate has customised its browser-based reports to provide performance and revenue information, which is exported for use directly in the accounting system.

So the single multi-user web-based system, configured for Charter UK's specific requirements, is providing a complete solution to the need.

Work requiring a MS Project plan is synchronised with the Innate database, while other work is entered through a spreadsheet style view on the browser. Planned work appears on users' timesheets at the right level of detail, and they can add other permitted codes for unplanned work. And the financial reports that Charter needs, with export to Excel, are run through the browser.

Innate has been able to provide a total solution with a single database of plans and actual effort expended, synchronised with MS Project, and accessed entirely through the browser. And the whole multi-user system is easy for all parties to use.

### **Benefits to Charter UK**

The direct benefits to Charter are much less time and effort expended on resource allocation and preparation of accounting information, better use of resources through greater visibility of over and under-utilisation, and improved visibility of profitability by project.

And the benefits to their customers include greater certainty of timely delivery and responsiveness to change through better resource management.

Paul Clark (CEO) says 'Within the one system, we are able to obtain better visibility of our resource utilisation, measure our performance, and forecast our billings by month on each customer project; so implementing Innate has had a positive effect on our business at modest cost and implementation effort



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