



Blais & Associates

Liberates from Manual Time Tracking and Accelerates Revenue Growth

Blais & Associates *professional grant management*

Industry: Grant Management

Company Size: Small

Products Used: Project Costing,
Client Billing

Challenges

- Manual approach to capturing billable time stunted business growth
- Wanted to keep transparency in client invoices
- Limited audit trail of time management
- Needed better way to account for time and spending across multiple projects in real time
- Sought to reduce delays in invoicing and payments
- Needed seamless integration with accounting system

Should the president and chief executive officer of a dynamic, fast growing grant management firm be spending 50 hours each month manually recording employees' time? Of course not, but that was the unenviable situation Neil Blais of Blais & Associates (B&A) found himself in — until he discovered Polaris.

Manual time recording stunted growth

From its headquarters in Texas, B&A manages a network of part-time staff located in California, Colorado, Oklahoma, Missouri, and Texas. Every month, each staff member used to send in an Excel spreadsheet detailing their project work activities, broken down into 15 minute increments. This included everything from needs assessment and grant writing, to working with the client's lobbyist in support of congressional or state earmarks, so that clients could understand every action, activity, and discussion that took place.

Blais then transferred the time and details from Excel into the company's accounting platform, massaging the content as he went along to adapt the language and add context. "I used to sit on the board of a city council and remember seeing \$20,000 lump sum invoices arrive from consultants with no narrative of what was involved. We pride ourselves on our transparency at B&A, and want to give clients as much detail and insight as possible into the work we do," Blais explains.

As Blais sat hunched over the spreadsheets, he realized that his time could be better spent writing a response to a grant management request for proposal (RFP) or contacting new business prospects. "Blais & Associates procures millions of dollars every year in grants for clients from government and private funding sources. The business is growing fast, but capturing the billable time of our staff was stunting our growth. There were occasions when I had to choose between replying to a city's RFP or recording staff time. Cash flow comes first, so recording time took priority. But it hurt." It was time to act.

Polaris supports integration, flexibility, compliance, and transparency

Polaris was the only solution Blais saw that offered seamless integration with the company's accounting system: data could be moved between the two systems in seconds, with Quickbooks just a few clicks. Polaris also gave B&A the flexibility to quickly track internal costs and manage client billing rates. According to Blais, Polaris was a cut above other solutions the company considered. "The Polaris team gave us confidence that we were dealing with a mature, experienced organization — one that could expertly deliver a powerful time billing system."

B&A now uses Polaris TimeBill to capture billable time and project costs in a fraction of the time it used to take. The company's employees enter their daily time in 15 minute increments, along with associated commentary, directly into Polaris themselves. As a result, Blais is not only freed from the burden of manually recording all of this data, but he has discovered additional benefits. The company can accurately account for spending across multiple projects in real time, link time spent to specific funding sources, identify where money is spent and justify this spending to clients, and create a robust audit trail to streamline and simplify compliance.

The City of Anaheim, California, for example, turned to B&A to write a grant application for the development of a local park, which provides much-needed recreational resources in a high-density, low-income neighborhood. B&A staff working on the grant application recorded their activity details directly into Polaris. Neil was able to review the timesheets remotely in Texas, ensuring that the client was billed accurately for the time spent. As a result, there were no billing disputes, no project overruns, and the City had a complete, compliant record of time spent on the writing of the grant application.

The Polaris deployment was fast and pain-free, too. "We were delighted with the expertise, knowledge, and experience of the Polaris Customer Success team," says Blais. "They knew what we were trying to achieve and did everything in their power to deliver a best-practice time management system. Whenever we came up against a barrier, the Polaris team was very responsive."

Polaris has revolutionized B&A's time and billing process, delivering a series of compelling benefits

Shortened the cash fulfillment cycle

Polaris reduced the delay between when time is recorded by staff to the physical client payment by up to 30 days (from 90 to 60 days). By eliminating manual intervention, Polaris also cut up to seven days off the invoicing process. This improved cash flow, enriched revenue forecasts, and allowed more efficient resource allocation.



“ Our old manual time tracking system was a limiter on growth. We’re getting new clients and hiring more staff, so using Polaris is a strategic move. ”

Nail Blais, President and Chief Executive Officer, Blais & Associates



Reduced revenue leakage

The accurate, real-time view of project costs has enabled B&A to significantly lower the amount discounted for project cost overruns on fixed-bid projects, saving \$30,000 annually.

Increased revenue and profitability

Blais is using the extra 50 hours every month to write a response to at least one additional RFP, or contact 20 new business leads. He estimates that it will add up to four new clients in the next few months — partly driven by the extra time made available by Polaris for new business development.

Reduced risk

The B&A team is able to monitor the progress of grant applications against budget and take proactive action against cost overruns. Moreover, B&A provides clients with a detailed commentary on all time billed, which creates a robust audit trail and simplifies compliance.

“There’s no doubt that Polaris is helping B&A to grow — and grow quickly,” concludes Blais. “By automating the time tracking and billing process, we devote more time to new business development, enjoy more trusted client relationships, and comply with the regulatory requirements of governments and enterprises alike. We’re happy to have implemented truly inspirational technology from an innovative leader in time tracking.”

Results

- Lowered gap between time recording to physical payment by up to 30 days
- Reduced revenue leakage by \$30,000 annually
- Cut invoicing process by seven days by delivering fast, easy integration to accounting platforms
- Freed up to 50 hours per month of CEO’s time to concentrate on new grant management bids, supporting acquisition of up to four new clients in the next few months
- Reduced risk, created robust audit trail, and simplified compliance



About Polaris

Polaris, the world’s first Self-driving PSA, has created a new category for Professional Services Automation. For the first time, leaders get intelligent help with decision making as Polaris does the heavy lifting, analyzes real-time data, and delivers live recommendations on the best possible choices for them to decide from. Polaris is created by the team at Replicon, the Time Intelligence company, with over 25 years of industry leadership in enterprise time tracking. Replicon supports thousands of customers across 70 countries, including PwC, SAS, NTT, NSC Global, Omnicom, and Aon.

To learn more, visit www.polarispsa.com

Want to try it for your business?

Watch a live demo now. Free one-on-one support is available throughout the trial:

www.polarispsa/live-demo

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