

# Box Success Story

INDUSTRY: Technology (HW/SW/SaaS)

LOCATION: Los Altos, CA

PREVIOUS SOLUTION: None



## Company Overview

Founded in 2005, Box is transforming the way people and organizations work. As the world's leading enterprise software platform for content collaboration, Box helps businesses of all sizes in every industry securely access and manage their critical information in the cloud. Box is headquartered in Los Altos, CA, with offices across the United States, Europe and Asia. More information is available at [www.box.com](http://www.box.com).

## The Challenge

Box's growing team of professional services consultants run hundreds of active projects at any given time, and provide services to a vast range of customers -- from those with 25 employees, to those with over 300,000.

To effectively manage the company's strong and continuous growth, Box's VP of Consulting Tim Smith recognized that his team needed tools and processes to help build and quickly scale a brand new professional services organization, including:

-  Tracking and reporting on time management to plan for team growth
-  Quickly onboarding large numbers of new team members
-  Measuring project performance and outcomes
-  Providing implementation visibility to executives
-  Supporting hand-off between sales teams and consulting teams
-  Tie business outcomes back to a project

### EXECUTIVE SUMMARY

#### Challenge:

A brand new professional services team needed tools and automated processes to help build and quickly scale their organization

#### Results:

- Automated process for project closeout report completed over 2,000x
- Integration with Salesforce & Box completes customer lifecycle tracking
- Improved visibility into project profitability and service delivery



“Clarizen helps us automate our project portfolio management to let us quickly scale our consulting team and project delivery.”

— Tim Smith  
VP of Consulting, Box

## The Solution

Since implementing Clarizen, Box is reaping significant benefits, and the consulting organization is more efficient, agile and better positioned to succeed. This improvement is unfolding on two levels: delivering added customer value, and supporting consulting and sales teams.

**Delivering Added Customer Value** — Thanks to the recently enhanced Clarizen and Box integration, Box users can now view all of their uploaded files and folders directly in Clarizen. Additionally, when a new project is activated in Clarizen, a folder in Box is automatically created and connected to the project, which ensures that it is consistently pre-populated with relevant documents. This integration between the two best-of-breed cloud solutions fosters increased productivity that drives better business results for the professional services team.

**Supporting Consulting and Sales Teams** — In addition to leveraging the above-noted integration, Box is using Clarizen internally for both timesheet reporting and life cycle tracking. The company is also taking advantage of Clarizen's full integration with Salesforce by automatically syncing projects between the two platforms. This has created clarity and synergy between sales and consulting teams, which continues to drive improved project performance for both the company's pre-packaged and customized projects. As Smith notes:

"For our pre-packaged projects that have a fixed price and scope, Clarizen allows us to assign them automatically to implementation teams, who get a link to the contract and are basically 'off to the races'. For our custom packages that are often necessary for our larger customers, we can take a spreadsheet-based estimating model and lay it out in Clarizen, so that consultants access a highly tailored and customized project plan that they can move forward with.



"The big goal that we achieve here is that our people can just pick up the work and get started. They don't have to worry about the details, because they're now getting what they need to move forward."

In terms of project execution, Box's teams have embraced Clarizen and made it a part of their day-to-day work experience. Consultants are using Clarizen to access the information they need, as well as input data and collaborate. Box is also using Clarizen to generate visibility at the executive level. For example, Box is now rolling-up and publishing out top accounts (a.k.a. "lighthouse implementations") to its executive team, so they can track progress and timelines, analyze how the account is trending overall, and proactively address issues or problems. Box's marketing team is also leveraging this data to mine for customer stories and use cases. "For our marketing people, this content is gold!" comments Smith.

With respect to reporting for individual projects, Box is using Clarizen to track a balanced and realistic set of metrics that includes utilization and performance against baseline. Box is further taking this project data and syncing it with both Salesforce account data and its own internal system data, so that it can generate deeper insights on budget optimization and product utilization. According to Smith: "Our whole mission with Box is to make people really successful with our product. Clarizen gives us a better way to focus on and analyze the success of our customers".

For project closeout and lessons learned, Box is using several built-in fields in Clarizen that must be filled out by key project stakeholders, including senior executives. This is an invaluable data capturing process that has been completed over 2000 times. Together with surveys that are sent out as part of the same flow, Smith says the process is particularly valuable because it **"ties the whole Box community together"**.

## RESULTS

-  Seamless hand-off between sales and consulting teams for project kick-off
-  Complete customer life cycle tracking
-  Timesheet reporting
-  Deploying automated, repeatable processes for consistent service delivery
-  Tracking balanced and realistic metrics (e.g. utilization, performance against baseline, etc.)
-  Higher degree of visibility among executives into project health
-  Project closeout report and lessons learned process captures invaluable intel from all team members involved

## About Clarizen

Clarizen is a leader in collaborative work management, bringing together cross-company project management, configurable workflow automation and purposeful collaboration in an enterprise-grade platform. Visit us today at [www.clarizen.com](http://www.clarizen.com)

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