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## Integrated CRM, PSA and ERP Solution for Infor and Sage Providing an All-in-One Project Services Automation System



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**'I am very fond of saying, "The most expensive, disruptive way to upgrade your technology is to do it twice." We'd like readers to avoid that.'** - Mark E. Engelberg

**Interview conducted by:**  
**Lynn Fosse, Senior Editor**  
 CEOCFO Magazine

**CEOCFO: Mr. Engelberg, would you tell us about the all in one approach at TimeLinx Software, Inc™?**

**Mr. Engelberg:** TimeLinx is not technically an "all-in-one" system though it functions as a fully-integrated solution. All-in-one systems require a complete replacement of all current software systems. What is different about TimeLinx is that we enable a company to keep their existing CRM and ERP systems while embedding TimeLinx' project and services functionality "in between" them, enabling streamlined work delivery. This delivers a complete and unified system from "quote to cash." By connecting a customer's CRM system with their PSA (Project or Professional Services Automation) system and their ERP (financials) system, companies can have a connected process that manages an entire relationship lifecycle. From the time a marketing campaign response is received, Sales identifies and qualifies an opportunity and then hands off to the Service delivery team once sold - that all happens in one system - one seamless process in a single user interface. A set of connected systems provides more comprehensive information than separate systems plus many additional opportunities for business intelligence while also improving efficiencies by connecting business processes. A design that utilizes the existing CRM and ERP system yields huge cost savings in terms of avoiding installation disruption and enabling greater efficiency and accountability within the business. This also allows a company to choose best-of-breed or a specialized ERP system without having to compromise on other functionality. That's our value add to our customers.

**CEOCFO: What is the TimeLinx solution?**

**Mr. Engelberg:** TimeLinx provides a company with a complete project and service automation system embedded within their CRM system and user interface. All prospect and customer data from the beginning of the sales process is available to the execution team of users who now have new functionality to deliver work through project and service automation. The new prospect moves through the relationship lifecycle from prospect to customer, enabling exceptional hand-holding and customer service by providing the right tools to the departments that need them while sharing all relevant data. Eliminating multiple applications is one major reason for succeeding in this area. Beginning each new relationship with CRM and then switching to a different application for each different team to do their work results in a disconnect between your sales team, your service team, and perhaps your support team. However, it's critical to maintain that relationship built by sales through the work, delivery, and support processes. If your people on the delivery side do not have access to the information collected during the sales process, it makes it more difficult to ensure you are delivering what sales promised. The "light bulb moment" for me 12 years ago was to expand the CRM system to accommodate complete product and service delivery functionality that could make more use of the CRM's data. If I am marketing and selling in the CRM system, wouldn't I want that information to be available to my delivery team, and that additional information also to be

shared with sales and customer service (which is typically already a function of many CRM systems today)? I'll answer the question. Of course you would!

**CEOCFO: *How do you keep a system that is covering so many areas from being too cumbersome?***

**Mr. Engelberg:** That is the secret sauce! The early designs of CRM systems were intuitive applications that possessed the ability to add demographic data that was unique to each customer. So we chose two CRM systems that were easy to use and expandable at reasonable cost. We chose the formerly-named SalesLogix product that was recently purchased by Infor and renamed to Infor CRM, and the mainstream CRM product owned by Sage Software. Both met the criteria of ease of use, exceptional expandability, and reasonable cost to businesses of all sizes. That hasn't changed.

**CEOCFO: *Do you worry that someone will create one of their own?***

**Mr. Engelberg:** We're not naïve but it would be hard to keep up with our model of innovation and integration. Individual features are just one part of an application. Microsoft Outlook and Google's Gmail, for instance, are both email systems with many similar features, yet people have strong feelings for one or the other. So ultimately, it's very much about the design of those functions, and how they integrate with each other to provide a capable yet easy-to-use product. At the time I came up with the idea for TimeLinx, I found myself switching from my CRM system, to a project application to manage the services we needed for delivery, to a third application to invoice that work and track job costs, plus multiple spreadsheets to track all sorts of additional information (expenses, assets, etc.). It was just crazy. But that's all there was back then. I felt I could build something better but had one additional stumbling block: I already had CRM and ERP systems that I liked and could afford. So, I didn't want to replace them and decided that expansion and connectivity were going to be better options than wholesale software replacements. With over 10 years of development, every TimeLinx product has transformed over time to offer unique capabilities that would be difficult to re-create. So, to answer your question, it would be incredibly challenging today to develop the rich feature set AND do all the embedding and integration we do given how advanced and sophisticated CRM and ERP systems have become.

**CEOCFO: *Are clients able to customize to an extent? Can they find things the way they want, how they want or are there certain constraints to make the system work more efficiently?***

**Mr. Engelberg:** Yes, the choice of basing our products on well-established CRM products gives customers the advantage of extreme customizability to add unique data elements without affecting the basic UI or the stable nature of the base CRM products.

In a ground-up development effort, the constraint is that packing too many features into a new design can result in a product that doesn't work well. Trying to get a large, competitive feature set "right" the first time is almost impossible without user input. So engineers get carried away building features that may not be user friendly unless they first spend months of time conducting UI focus groups. Then the development lifecycle becomes so long that technologies and user preferences change. So we started with established products that already had sizeable user populations and therefore had been vetted by many customers and benefitted from continuous improvement.

**CEOCFO: *Are many companies looking for a more inclusive system? Do people believe it can really exist?***

**Mr. Engelberg:** Today, inclusiveness is a predictable requirement. Everyone knows it's possible to have a system with all the features they want but it may be out of reach in terms of total cost-of-ownership and feature complexity. Years of dealing with silo'd applications makes the choice of an all-in-one system or a set of connected systems a top requirement. The few products that are true all-in-one products are out of the price range of many companies and would result in costly disruption to the entire staff. Customization or tailoring features becomes even more challenging with such products because a change to one part of the system usually impacts other parts. So an alternative that provides the ability to achieve this functionality without having to swap out your existing applications, with virtually no installation disruption and negligible training, is very attractive.

Most importantly your users don't need to re-learn user interfaces. A question I often hear is whether or not all of the connected applications will look and feel the same. But if you think about it, users in the Accounts Receivable department already use different screens than the Accounts Payable department. Which is different than the salespeople as well as the service people. Every interface in existing products is purpose-built already. Avoiding the disruption to all those users with TimeLinx increases the benefit of everyone avoiding change, and people just don't adapt easily to change and don't like it. An inclusive all-in-one system is a message that everyone will be learning a new system and pain is on the way.

**CEOCFO: *How do you help a company start with TimeLinx? How can you get on top of any problems?***

**Mr. Engelberg:** One of my favorite sayings is "measure twice, cut once." It's a term straight out of the construction industry and it means that if you prepare well, your outcome will be a good one. So that's our point-of-departure. We and

our Certified Business Partners perform thorough requirements analysis workshops to reveal the intricacies and uniqueness of each customer's business. Our product choices in using the scalability of Infor CRM and Sage CRM allow extreme flexibility in configuration and fitment for a wide range of industries. Sometimes it can be a challenge, but our product is designed to need minimal customization yet adapt to each company's unique requirements. It's probably a cliché to say we can meet most requirements without customization but it's true. We are not a lightweight product unless that's what you want using one of our more entry-level products.

Every situation is different and yet our products can accommodate most project and service requirements from simple to complex. Some customers want TimeLinx for task management, others for controlling job costs, others to re-establish project profitability as a responsibility of project managers, and others to speed up the quote-to-cash process. Other companies have difficulties with the handoff from Sales to Service and the communication disconnects between those teams. And in every case, multiple, disconnected applications were the norm. So, ultimately, we are dealing with many different situations and complexities in different industries. The first step is always listening and understanding the unique business issues.

One customer, a global manufacturer with facilities in 14 countries and hundreds of service engineers had very complex billing scenarios. They searched for a solution for five years before coming across TimeLinx to plug into their Infor CRM system. The company provides installation, maintenance, and repair services for their products. They invoice in multiple currencies and provide services under many different pricing contracts with differing charges and costs. The challenge was eliminating the manual bottleneck of calculating billing amounts for each customer invoice, and the job costs that lead to payroll. Imagine receiving 300 spreadsheets each week with time entries and 300 more with expenses? By having the field teams enter time, expenses and field notes into our mobile client, the spreadsheets went away as did all the manual calculations. The TimeLinx "Profit Optimization Engine" improved their cash flow by shortening the time to prepare an invoice from 7 weeks to 5 days! They started with 75 users eight years ago, and today have over 300 TimeLinx users! We are happy to have enabled that growth and it was made possible by listening to and meeting their specific needs.

**CEO/COO: *That is a big difference!***

**Mr. Engelberg:** Their CEO and CFO agree with you!

**CEO/COO: *TimeLinx was recently recognized by CIO Review as one of the twenty most promising project management solution providers of 2016. Would you tell us about the recognition?***

**Mr. Engelberg:** Of course, it's wonderful to receive recognition for your efforts. I'm proud of my team's ongoing research and development in building products that are unique in the marketplace and that have been so well accepted by customers. The award says a lot about the differentiation that we bring to the table. When we created the first version of our product in 2004, project management within a CRM system was unheard of. Our Revenue Optimization functions and conversion of time and expense entries into revenue and cost values for the ERP system came afterwards. All of those pieces are part of our unique differentiation and part of the award recognition. We created the project management space within CRM and now others are following our lead. That's a really nice market validation of our efforts!

**CEO/COO: *Who is turning to you; what types, sizes and location of companies? What might people not understand immediately about what the system is capable of doing?***

**Mr. Engelberg:** For most companies, they really have no idea how much money they are either losing, or leaving on the table. Our customer base spans service companies or departments in architecture, engineering, technology integrators, consulting firms, and manufacturing. That is a broad base of industries and yet we have succeeded with all of them. The company size doesn't matter as the SQL backbone and scalable architecture of our design accommodates companies with twenty to hundreds of users. And because every customer is concerned about the costs of upgrades, if we need to build new functionality for them, we developed a policy of putting most feature requests into our core products unless they were proprietary or very unusual. So using switches and settings, not a single customer of ours is on a custom system. This makes their upgrades easy and affordable yet provides precise functionality to the customer. And for customers that don't need all of our capabilities, it is easy for customers to turn off and hide features they don't need today while being easy to turn back on when they do.

In every case, we provide an initial assessment of requirements to determine how close we come to meeting what they need. We need to educate our prospects that it really is possible to have everything they need in one system while keeping it easy to use. As we cover so much ground, users from multiple departments participate in the decision, and we provide evaluation opportunities running on our servers so that a customer is sure before they commit.

**CEOCFO: *What is the takeaway for our readers?***

**Mr. Engelberg:** Do your homework. Think ahead of where your organization might be in 5 years. You are not going to want to replace a purchase before then, at the earliest. So calculate a 5-year cost-of-ownership plan, at a minimum. Will you possibly acquire another business and need additional capabilities? Are you thinking of expanding into new product lines or services? Will you need flexibility in growing your ERP capabilities yet not want to be forced to change your CRM or PSA system? Make sure you really understand each vendor's possibility of hidden costs. All these are important things to think about before signing on the dotted line.

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