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Mixed Platform Environments - Benefits of an Integrated Project Management Solution

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Many creative agencies have completely separate systems to manage their jobs and to do their accounting.

This is partly due to how the companies are set up with regard to their IT system and the compatibility of accounting software:

Apple Macs are widely used for the studio's creative work whilst for it's project management either PCs or Macs tend to be used usually depending on the background the project managers have. If they come from a creative background they are inclined to continue to use Macs for their project management, if they come from a business background they are more likely to be used to operate PCs. In both circumstances it is often Microsoft Office software like Excel and Word that is used for the project management, although an increasing number of firms put open source software in place.

On the other hand most mainstream accounting packages are based on Windows PC platforms and - again due to familiarity - finance users tend to prefer PCs to Macs for their work.

Having a mixed platform environment will often mean restricted sharing of server resources. The finance department is not able to access the studio's Mac server and the studio staff has no access to the commercial documents on the PC server. As a consequence of such a setup information exchange still heavily relies on paper documents being conveyed around the office. When a project is finished the work documentation and sometimes invoice drafts are handed over to the finance department in order to produce the invoice and record it in the accounting software.
If finance team members need to have a look at the creative brief they ask the studio for the job bag, if the studio gets a client query about an invoice a copy is requested from the finance team, unless there is one in the job bag.

It can be simpler: If an integrated system is used that is compatible across platforms everybody works from the same data and there is less paper work necessary. Non-confidential data is readily accessible to everybody, whilst a username - password protection ensures that confidential finance data is only visible to those members of the company it is intended for. Information entry can be commenced by one team (e.g. the studio) and then be picked up by another team (e.g. finance) rather than having to be re-done.

In particular this last point, the avoidance of work duplication, has been found to be the biggest improvement to workflow and time saving by organizations that have put such a system in place:

· Details of AP invoices don't have to be entered by the finance department, as they are already part of the purchase orders, placed by the studio.

· Time and costs of projects can easily be picked up in the preparation of AR invoices. The same applies to quotations that can easily be picked up to template AR invoices.

· Project Managers can draft these invoices that only need to be made live by the finance

department, which retains final control.

· Project managers are able to pick up old invoices and use them as templates for new ones for similar work.

· Everybody has access to the electronic job bag to look at project information and project related documents or work files.

Time recovered by the avoidance of work duplication can then be used for fee generating work and experience from implementing such systems shows that companies that follow this route improve their revenue by an average of 30 to 40 %.

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