End User (Experience Hire Field Consultant on the road)

- Locate Clients and project codes
- Enter Time on Client and Project
- Review Personal Time reporting
- Client Time Submission review / approval
- Track my time with clients on a calendar
- Enter Business expenses
- Track Mobile voice/ Data expenses
- Book Travel on the phone (with system administrator)

Locate Clients and project codes	Send email to ask Client Relationship Manager and ask for client code and project code
Enter Time on Client and Project	Fill out a spread sheet with a row for each day, client id, project code and hours
Review Personal Time reporting	I manually tally up the totals from in my monthly spreadsheet to see how much billable work I have completed
Client Time Submission review / approval	eMail to Client Relationship Mangers , Must have it done my end of month but try to do it more often
Track my time with clients on a calendar	I will frequently log my time with each client and project on my calendar as a note so I can remember where to charge my time
Enter Business expenses	All expenses are charge to our Corporate Credit cards, which we are personally responsible to pay. We fill out a separate spread sheet to get reimbursement for the expenses, information includes a scanned copy of the monthly charge bill, and information includes a scanned copy of the monthly charge bill. This information is sent to the Client Relationship Managers who approves then sends it on to the System Administrator who enter the data into the payroll system.
Track Mobile voice/ Data expenses	Centrally managed by the system administrators, once we are given a phone we just use it. Only time we are contacted about the smart phone is if the calls or data is excessive.
Book Travel on the phone (with system administrator)	Call the system Administrators to book flights, hotels and cars. We give them our Corporate Charge Card number.

End User (In the office low time experience Central Consultant)

- Locate Clients and project codes
- Enter Time on Client and Project
- Personal Time reporting
- Client Submission review / approval

Locate Clients and project codes	Receive an email from the Field Consultant indicating the work we need to do for them and the client code and project code to charge to.
Enter Time on Client and Project	Fill out a separate spread sheet for each Client Project with a row for each days hours
Review Personal Time reporting	I manually tally up the totals from in my monthly spreadsheet to see how much billable work I have completed
Client Time Submission review / approval	eMail to Client Relationship Manger and copy the Field Consultant , Must have it done my end of month but try to do it more often

System Administrator

- Setup new clients
- Setup Projects
- Accept and run client report requests
- Build reports
- Book travel arrangements for consultants

Setup Clients	We receive emails from the Directors asking to have a new Client add or updated to our Billing System. We type in the new name and if it does not find a match we enter the new client information. When we are done we send an email back indicating that the client has been setup and give them the Client ID information. If already exists we double check the billing information to make sure it matches. If it does not match will send an email to the director telling them about the differences and wait for their response. If all the data matches we just let them know the client was already in the system and give them the Client ID information. Data: Client ID, Client Name, Industry Description, Service line Description, CRM attached to the client, Billing address and phone number
Setup Projects	We receive emails from the Client Relationship Mangers asking to have a new project codes add or updated to our Billing System. We type in the new project name and if it does not find a match we enter the new project information. When we are done we send an email back indicating that the project has been setup and give them the project ID code. If already exists we double check the description and client information to make sure it matches. If it does not match will send an email to the CRM telling them about the differences and wait for their response. If all the data matches we just let them know the Project was already in the system and give them

	the Project ID information. Data: Project ID, Project Description Project Owner, Related Client(s) ID
Accept and run client report requests	We can schedule reports to run automatically and be email to requestor, we currently have monthly scheduled Client billing reports that are sent to the CRM's. This process also sends a file over to the Accounts Receivable system which automatically generate and mails invoices directly to the clients at the same time. We also have quarterly industry (Client rollups) and high level productivity (Consultant billing) reports generated and sent to the directors We receive requests, via email, all throughout the month to run the same reports as of a specific date to get an interim view for the billing and hours
Build reports	We frequently receive requests, via email, all the time from the Directors and CRM to create custom Ad-hoc one time reports
Book travel arrangements for consultants	We receive phone calls to book Flights, Hotels and cars for the field consultants. We have a contract with a third party Travel booking vendor that allows us to locate and book the need travel elements. Pretty much works like the same ones you find on the internet.

Client Relationship managers

- Time Review and approval
- Travel expense allocations to Clients
- Client billing submission
- Resource tracking and reporting (all types of consultants)
- Project code administration setup requests
- Client Report requests

Time Review and approval	Receive filled out spreadsheet templates, via email from the Field and Centralized consultants that are assigned to my client. If I see issues with the hours sent to me by the consultants I will send an email back indicating my concerns and ask them to resubmit to the templates
Client billing submission	Once I am satisfied with the hours I will enter and submit the hours into the Billing system, typically very busy at the end of the month. Data included in the submission: Client ID, Project ID date, resources type, Rate and hours.
Travel expense allocations to Clients	We review the travel expenses submitted by the field consultant and manually applied the proper charges to general expense category for the client in the Billing System We will then send an approval along with the travel expense submissions from the filed consultants to the Systems Administrators to have them reimburse through the Payroll System.
Resource tracking and reporting	We have a MS Access Tool that allows us to track the individual consultants work by importing the template sheets into the tool. We can then run reports on the constants productivity. This is a standalone tool that most of the CRM's use to manage their resources and projects.
Project code administration setup requests	New project code and update requests to the billing system are sent to the System Administrator

	via email.
Client Report requests	We receive standard monthly billing reports that are review to confirm the all was processed correctly. If there are errors we correct the hours resubmit and have the invoice recreated. We also will request custom and interim report to be run throughout the month

Directors

- Client administration setup request
- Service line and Industry level reporting
- Organization reporting summary

Client administration setup request	New Client requests and updates to the billing system are sent to the System Administrator via email.
Service line and Industry level reporting	We receive monthly reporting on the organizations performance based on Service line and Industry grouping. We frequently will ask for custom reports to data mine for opportunities and weakness in our business.
Organization reporting summary	We receive quarterly reporting on the organizations billing hours and revenue and then manually cross reference to the HR systems employee head counts to determine the resource utilization rates and profitability.