



How LMG Increased Operational Efficiency Despite a Global Pandemic

CASE STUDY



“Workamajig has definitely streamlined our billing process [but] it’s hard to pick out one particular game-changing feature, because everything is interwoven. It’s truly become our center for organization.”

Karen Gould,
INFRASTRUCTURE AND IT DIRECTOR,
LUNNE MARKETING GROUP



Lunne Marketing Group

LMG is a full-service marketing firm that helps businesses with creative intelligence, strategy, content creation, design, and digital integration.

HIGHLIGHTS

CHALLENGES

- Consolidating four software solutions into one user-friendly system
- Improving profit margins by tying time tracking to accounting and expenses
- Defining processes to give team members clarity into roles and responsibilities

Challenges

CONSOLIDATING DISPARATE SYSTEMS TO IMPROVE PROFIT MARGINS

As agencies grow, they often introduce new software on a need-to-have basis to solve specific challenges. That's what Lunne Marketing Group (LMG) had done—and, for a time, it worked. Eventually, they wound up with numerous systems, including:

- QuickBooks for accounting
- Basecamp for project management
- Tick integrated with Basecamp for time tracking
- EasyInsights to pull and integrate data from Basecamp and Tick for resource allocation

But as Karen Gould, Infrastructure and IT Director, explains, it wasn't long before the day-to-day management of separate systems was adding extra work instead of making life easier.



“We had four disparate systems and no clearly defined or documented processes. It worked for an agile startup. But as our company grew, the pain points associated with managing so many different systems became unsustainable,” she says.



SOLUTION

- **Finance & KPIs** to assess profitability, guide hiring, and automate invoicing
- **Project management** to track conversations, manage files, review change requests, monitor budgets, and more
- **Built-in dashboards** to help every role operate efficiently and simplify time tracking
- **To Dos** simplify scheduling and give users clear tasks
- **Integrated data** to fit everything together into comprehensive reports

RESULTS

- Seamless project management for 100% of LMG employees
- Integrated time tracking and billing giving more visibility into project profitability
- Ability to pivot to a remote workforce with minimal disruption

LMG was looking for ways to improve time tracking, standardize processes, and clearly communicate workflows to the entire team. Karen knew that they'd be able to save time and money if they could integrate systems—and find a solution that would scale with them as they grew.



“We wanted to improve our profit margin by doing a better job tracking our hours and expenses. That was a top priority,” she says. “We also needed to define our processes so that we could give the team clarity around roles and responsibilities with respect to everyday tasks.”

With a well-defined need to transition to a more scalable solution, senior leadership began looking for the best fit for LMG. That's when Doug Lunne, President of LMG, heard about Workamajig from another agency owner.

Karen began researching Workamajig. She sized it up against every competitor on the market. After careful consideration, she reached a conclusion:



For an agency of our size with our needs, there wasn't any comparable tool. Workamajig was the only solution that seamlessly integrated accounting with project management—which was something we really wanted.”



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Solution

STREAMLINING AND INTEGRATING DAILY TASKS

Karen began working with Workamajig in April 2019. She admits that, at first, she was a little overwhelmed by the sheer variety of options available to her.



“Workamajig gives you an enormous toolbox, but it doesn’t dictate how to use the tools. If you understand your internal processes and know what needs to be improved, it’s a fantastic piece of software.”



With the help of a dedicated Workamajig Account Manager, it wasn't long before every LMG employee was using Workamajig to streamline day-to-day workflows.



“100% of our team is using Workamajig and we're touching almost every tool in the offering. It's our project management system, our accounting system, and our reporting system. We use the to-do board extensively. It's definitely streamlined our billing process.”

The most significant improvement came after integrating accounting and project management systems. Now, LMG can use Workamajig to accurately track (and bill for) the time employees spend on a project—both in-office and remotely.



“When it comes to project management, there is no other resource we use. It keeps all of our files and assets organized. We also use it to communicate our company values, host stronger core meetings, and promote healthy lifestyles,” Karen explains. “It's hard to pick out one particular game-changing feature, because everything is interwoven. It's truly become our center for organization.”

According to Karen, the impact of uniting all of their disparate systems under Workamajig was quickly felt by all employees. **She estimates that it increased time efficiencies by up to 10% within weeks of deployment**—and one team member even emailed her about the improvement.

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“She said, ‘I absolutely love this system, the dashboard features, and all of the nuances of accountability and time management that come with it. I am a box-checker and I struggled previously in certain areas with anxiety around not knowing where things stood. But not now.’ She had no idea I was doing this interview,” Karen laughs.

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Results

OVERCOMING A GLOBAL PANDEMIC

In early 2020, everything was going well for LMG.

Workamajig had just been rolled out company-wide and employees were familiarizing themselves with the new system. Streamlined workflows were already showing promising results and profitability was trending upwards.

Then life turned upside down. COVID-19 spread like wildfire, and before long it was state-side. LMG—like many agencies—needed to act fast and embrace a remote workforce.



“There was anxiety: ‘How do we adjust to this brand new system? How do we pick up and start working remotely?’” Karen says. “But for me, there was an extraordinary sense of relief. Workamajig enabled us to adapt and start working from home with minimal disruption. A few team members were worried at first, but that anxiety settled down within days.”



Karen says that having Workamajig in place was a ‘sigh of relief.’ They’d abandoned their four disparate systems, and united everything—project management, accounting, time tracking, and resource allocation insights—under one roof.

So when clients started asking questions about LMG’s pandemic response, the support team could answer with confidence. With Workamajig, it was business as usual.

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Karen explains, “We ramped up fast and worked hard to address our clients’ needs at the forefront of the pandemic. It was a trial by fire, acclimating to a new system in those conditions. But Workamajig allowed us to transition while keeping anxiety and stress levels relatively low. The system was working.”


While other agencies struggle to cope with upheavals to regular workflows, LMG is able to provide its clients with the same great, uninterrupted service. Not only that; on the back end, they now have more visibility into profitability than they ever did before.

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“Previously, we didn’t have the scope of reporting we needed to make data-backed business decisions. The absence of metrics would have been extremely overwhelming going into the pandemic. Workamajig’s baseline metrics have really helped us respond to the current crisis strategically.”

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A man in a dark suit and glasses is shown in profile, looking at a computer monitor. The monitor displays a bar chart with blue bars and a red line graph. The background is dark and slightly blurred, showing a desk with some papers and a pair of scissors.

**Old processes not keeping up?
Modernize your workflows,
with Workamajig.**

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