

Service Performance Insight, LLC

Leading a High-Performance Professional Services Organization



Collaborative Solutions Case Study

Collaborative Solutions, a Cognizant Company, is a leading global finance and HR transformation consultancy that leverages world-class cloud solutions to help deliver successful customer outcomes for Global Fortune 500 companies, large- and medium-sized organizations across industries. As the longest-tenured Workday Services Partner and customer, its full lifecycle services—complete with an in-house Advisory Services practice and proven proprietary tools—have helped more than 1,000 customers transform their businesses.

Collaborative Solutions has deployed cloud solutions in more than 125 countries and has experience working with organizations ranging from 200 to 200,000 employees. Collaborative Solutions is based in the Washington, D.C. metro area, and has offices throughout North America, Europe, and the Asia Pacific region.

About Service Performance Insight, LLC

Service Performance Insight, LLC (SPI Research) is a global research and consulting organization dedicated to helping professional services organizations make quantum improvements in productivity and profit. In 2007, SPI developed the PS Maturity Model™ as a strategic planning and management framework. It is now the industry-leading performance improvement tool used by over 35,000 service and project-oriented organizations to chart their course to service excellence.



About Bobby Riggs, Collaborative Solutions Chief Financial Officer

Bobby is the Chief Financial Officer at Collaborative Solutions. With 15 years of experience in finance, he began his career in higher education software with Blackboard Inc. In 2003, he joined Presidium Inc., a small education services start-up. During his eight-year tenure, Bobby helped drive Presidium's growth through strategic financial decision making, which led to multiple rounds of venture capital funding and the eventual merger with then partner Blackboard Inc. From the ground up, he has developed processes and the respective analytical requirements to drive progressive growth and continues to do so at Collaborative.

Bobby has strengths in all facets of finance and operations, auditing, banking, and account management. Bobby is an accomplished, highly analytical, hands-on-strategic leader who translates business strategies into maximum profits commensurate with the best interests of shareholders, employees and customers. He received his BA in Economics from George Mason University. Bobby is based in Reston, Virginia.

Collaborative Solutions is one of this year's top performing Professional Services organizations (PSOs) according to the [2021 PS Maturity™ Benchmark](#). For this case study, SPI Research sat down with Bobby Riggs, Chief Financial Officer at Collaborative Solutions, to discuss the impact of Workday Professional

Services Automation (PSA), Workday Financial Management, Workday Adaptive Planning, and Workday Human Capital Management (HCM) on the organization. Bobby was involved from the beginning of Collaborative’s Workday journey, from selection and deployment to on-going management of the Workday solutions.

[SPI Research](#) conducts an annual, in-depth analysis of top-performing PSOs to uncover the best practices, business processes, and systems that underly their superlative performance. SPI’s extensive annual survey, the [2021 PS Maturity™ Benchmark](#), revealed top performers were able to surmount the challenges and turmoil that characterized 2020. When the pandemic hit in March, top performers were able to quickly move to virtual operations without a hiccup because their cloud-based business applications gave them the visibility and access they needed to keep the business running smoothly in a virtual world. They continued to delight their clients through collaborative, frequent, open and honest communication. Top performers are far more likely to deliver projects on-time to satisfied clients than average firms with 88.7% of their projects delivered on time compared to 76.6% for average firms.

This past year, the top 20% of firms out of 561 organizations who participated in the survey, outperformed their peers and the benchmark average with not only more reference customers, but also significantly higher profits and superior revenue and headcount growth. Table 1 compares the performance of the top 20% of benchmark survey participants to the remainder. Despite uncertainty, top performers grew revenues and added employees. They grew revenues by 11.2% compared to 8.1% for average firms while they grew headcount by 9% compared to only 4.5% for average firms.

Table 1: Top 20% Performance Advantage

Measurement	Top 20%	All Others	Advantage
Number of firms	114	447	
Size of PS organization (employees)	459	570	-19%
Annual company revenue (mm)	\$149.4	\$182.7	-18%
Total professional services revenue (mm)	\$79.7	\$81.8	-3%
Year-over-year change in PS revenue	11.2%	8.1%	38%
Year-over-year change in PS headcount	9.0%	4.5%	98%
% of employees billable or chargeable	79.0%	72.4%	9%
% of PS revenue delivered by 3rd-parties	11.0%	11.7%	-5%

Source: SPI Research, April 2021

Why Maturity Matters

SPI Research believes wide support for the PS Maturity™ model is due to its holistic approach to measuring performance. **Maturity is determined through alignment and focus both within and across functions.** For example, although financial measurements are of primary importance, they are equally weighted and correlated with leadership and talent and quality measurements to ensure organizations improve across all dimensions, not just in terms of financial performance. However, if the organization is profit-motivated (which most are), increasing maturity levels do show up in significant bottom-line profit. Figure 1 highlights major key performance measurements by maturity level and should alone be an important reason why PS executives should look deeper into using it to increase productivity and profit.

As shown in Figure 1, all facets of performance improve with maturity. Maturity starts with leadership. Top performing firms have strategic clarity and a well understood mission which translates into superlative execution. Because they are well-positioned in a growing market, they are able to grow headcount and revenues faster than their peers. They run lean and mean with more employees in billable roles and higher billable utilization. Because demand and supply are synchronized, more projects are delivered on-time resulting in superior client outcomes and satisfaction. Top performers invest significantly more in integrated business applications than average firms leading to better visibility and significantly higher profits.

Figure 1: Professional Services Maturity™ Progression

	Level 1 Initiated	Level 2 Piloted	Level 3 Deployed	Level 4 Institutionalized	Level 5 Optimized
Number of firms	167	140	140	84	30
Confidence in PS leadership (5 pt. scale)	3.03	3.98	4.35	4.89	5.00
Year-over-year change in PS revenue	9.3%	6.0%	6.4%	12.5%	18.8%
% of employees billable or chargeable	69.7%	72.2%	75.9%	77.5%	81.0%
Deal pipeline relative to qtr. bookings forecast	128%	182%	181%	205%	226%
Employee billable utilization	54.4%	62.3%	76.4%	83.1%	85.7%
Projects delivered on-time	47.8%	73.0%	85.2%	91.3%	94.0%
Annual revenue per billable consultant (k)	\$50	\$133	\$213	\$269	\$290
Profit (EBITDA)	-10.1%	5.0%	16.1%	19.5%	32.0%

Source: SPI Research, April 2021

Leadership

In conversation with Bobby Riggs, “At Collaborative Solutions, the same leadership team has been in place for years, we have built a foundation of trust based on collaboration and fact-based decision making. Everyone understands the metrics that run our business and we all have real-time visibility to performance.” Leadership stability and transparency have provided steady direction

Table 2: High-Performance PSOs Comparison – Leadership (1 to 5 scale)

Key Performance Indicator (KPI)	Top 20%	Rest	▲
Well understood vision, mission and strategy	4.30	3.89	11%
Confidence in PS leadership	4.46	4.13	8%
Ease of getting things done	4.26	3.76	13%
Goals and measurements in alignment	4.15	3.74	11%
Employees have confidence in PSO's future	4.46	3.94	13%
Effectively communicates w/employees	4.25	3.96	7%
Embraces change - nimble and flexible	4.30	3.87	11%
Innovation focused	4.16	3.74	11%

Source: SPI Research, April 2021

for the firm. Collaborative Solutions was founded in 2003 and has been a Workday Services Partner since 2007, initially with a focus on Workday Human Capital Management. As Workday added Financial Management and Professional Service Automation solutions, Collaborative started to use these solutions internally and deploy them externally for its customers. ***Bobby Riggs commented, "The addition of Workday Adaptive Planning has been a game changer from a CFO point of view as it has opened up the fun side of Financial Planning and Analysis (FP&A). We are using Workday Adaptive Planning for capacity and headcount planning and budgeting. As the pandemic unfolded, we were able to do scenario planning based on different sales bookings assumptions."***

Specialization and a deep partnership with Workday have paid off for Collaborative Solutions with double digit growth over the past 18 years. The firm now employs more than 1,200 employees and generates more than \$250 million in annual revenues. Collaborative became part of Cognizant in 2020, one of the world's largest and most successful professional services firms. Cognizant is ranked 194 on the Fortune 500 and is consistently listed among the most admired companies in the world.

Collaborative's values embody the collaborative and knowledge-driven culture the firm is known for:

- **PEOPLE** - We believe in our people. We respect and value all individuals for their diverse backgrounds, experiences, styles, approaches, and ideas.
- **COLLABORATION** - We believe we are better together. Incredible things are achieved through teamwork and collaboration.
- **KNOWLEDGE** - We have an unending desire to grow and deepen our consultative expertise. We pride ourselves on being continuous learners and are always ready, always accountable, and always helpful.
- **BALANCE** - We believe the best outcomes exist when priorities complement rather than compete with each other. We strive for synergy between our personal and professional lives.
- **INTEGRITY** - We are guided by this simple principle: Do the right thing. We take responsibility for our own actions and are true to our word.

Leaders at the best firms foster a work environment that is fair and well-managed with ample rewards and career progression. Because employees understand and share in the success of these organizations, the atmosphere is one of cooperation, trust, and loyalty. Table 2 compares the leadership metrics of the highest performing organizations with the remainder of the survey. The highest differential score is in the ability to get things done and confidence in the PSOs future. Top performers have made investments in collaboration tools and integrated systems to streamline business processes, allowing them to move to a virtual work environment without missing a beat.

Some leadership principles remain constant: leaders take on challenges that others are not able to handle, and they invest in the future with a focus on innovation. Leaders are clear and decisive in defining their vision of the future and their firm's place in the universe. Strategic clarity is further cemented by transparency which manifests in confidence in leadership and trust. Leading PSOs cultivate egalitarian, non-hierarchical, apolitical organizations in which all employees are vested in the success of the firm as well as their own well-being. Their focus on innovation means they strive to

continually stay ahead of the pack, investing in new technologies and ideas long before they become mainstream. Their clarity of purpose provides a powerful foundation for their unique cultures which support and accelerate market differentiation, in turn leading to strong employee confidence in the future and customer loyalty.

Talent

Collaborative has been a [Great Place to Work-Certified™](#) organization since 2015. The company has received numerous recognitions from Great Place to Work® and *Fortune Magazine* for its workplace culture, including "[Best Workplaces for Diversity](#)," "[Best Workplaces for Women](#)," and "[Best Workplaces for Millennials](#)." Most recently, Collaborative ranked No. 1 among small and medium companies in Fortune's "[Best Workplaces in Consulting and Professional Services](#)."

According to Bobby Riggs, “Our employees are core to our company and our values. Workday provides the ability to offer transparency to our employees. We are a consulting company – we know who our consultants are – their skill levels, qualifications, certifications, location, travel preferences, previous project experience and more.

We make all of this information available from an employee perspective, so they are able to choose the projects of greatest interest that take best advantage of their skills and availability.”

“We use a centralized approach to resource management and capacity planning through the Workday PSA application. Opportunities are created in our Salesforce.com CRM system. As the opportunity evolves and the probability

grows to 50%, we assign a project start date in Workday PSA. Employees can see deals in the pipeline. Workday allows faceted search to find workers for projects and projects for workers. Our integrated business applications enhance transparency, supporting our open and collaborative culture and further engaging our workforce.”

Table 3: High-Performance PSOs Comparison – Talent

Key Performance Indicator (KPI)	HPP	Rest	▲
Employee annual attrition - voluntary	5.5%	7.4%	26%
Employee annual attrition - involuntary	4.3%	4.8%	12%
Recommend company to friends/family (1 to 5)	4.71	4.33	9%
Days to recruit and hire for standard positions	59.6	63.7	6%
Days for a new hire to become productive	48.0	61.5	22%
Guaranteed annual training days / employee	10.14	9.67	5%
Well-understood career path (1 to 5 scale)	3.52	3.24	9%
Employee billable utilization	79.4%	68.7%	15%
Annual fully loaded cost per consultant (k)	\$137	\$120	-14%
Onsite delivery	36.0%	42.7%	-16%

Source: SPI Research, April 2021

Table 3 compares Talent Pillar KPIs between the top 20% High-Performance PSOs (HPPs) and the others. Professional Service industry employee attrition, both voluntary and involuntary, was down in 2020 due to uncertainty caused by the pandemic but HPPs do a much better job of engaging and retaining their employees. A higher percentage of employees would recommend their firm as a great place to work. Because HPPs grow faster than average firms, they can recruit new employees faster, and they have better onboarding programs, so their new hires become productive in less time, shortening their ramping time and becoming billable faster. Two of the more significant differences between HPPs and

average firms in the benchmark are that high-performance firms had much higher billable utilization and much lower voluntary attrition. Their employees bill an additional 200 hours per year per consultant, which translates to a whopping \$60K more in annual revenue. And while they had higher fully loaded employee costs, the HPP firms made up for it in terms of higher billable utilization. They also did a much better job of supporting a virtual work environment, which reduced non-productive time while improving billable utilization.

Service Execution

Since its beginning, Collaborative has focused on delivering above and beyond expectations for its customers by applying industry best practices, disciplined guidance, flexible delivery approaches, and the most skilled and experienced Workday talent. Collaborative prides itself on its innovative technical tools and programs, including its INTEGRATION FACTORY® and Accelerated Cloud Deployment Center, cloud computing interface services, in combination with a truly “collaborative” consulting approach to transform customer operations. Collaborative strives to make each customer experience uniquely positive, and each outcome consistently successful.

Table 4: High-Performance PSOs Comparison – Service Execution

Key Performance Indicator (KPI)	HPP	Rest	▲
Average project staffing time (days)	8.31	10.24	19%
Number of projects delivered per year	410	411	0%
Average revenue per project (k)	\$228	\$129	77%
Average project staff (people)	4.32	4.02	7%
Average project duration (months)	5.89	5.43	8%
Projects delivered on-time	88.7%	76.6%	16%
Average project overrun	5.8%	9.2%	38%
Use a standardized delivery methodology	69.4%	64.7%	7%
Project margin for time & materials projects	38.7%	34.1%	13%
Project margin for fixed price projects	40.0%	33.8%	18%
Average project margin — subs, offshore	32.3%	28.1%	15%
Onsite delivery	36.0%	42.7%	-16%

Source: SPI Research, April 2021

According to Bobby Riggs, “Pre-Covid, 60% of our work was delivered on-site; on a dime we were able to pivot to 99% virtual delivery. We have reinvested our travel cost savings into cross training our consultants, expanding the depth and breadth of our consultant base expertise. Now we have been able to prove a model that is 100% virtual – still delivering on-time on-budget – what we don’t know is the long-term impact to our employee base. People like having no commute hours, it is a nice perk to eat lunch...and dinner...with your kids. Each year we hire more than 100 associate consultants fresh out of college into a new hire cohort or class. Due to Covid restrictions our winter 2020 cohort has been completely remote. In the future we will be able to look back and measure career progression to see how virtual operations may have impacted our employees. We rely on Workday HCM and Recruiting.”

Table 4 compares service execution metrics between the High-Performance organizations and the remainder. The table shows improvement in virtually every Service Execution metric. High quality service execution is what really sets top performing PSOs apart. They tend to be highly disciplined in all facets of service execution. Leaders tackle larger, more mission critical projects, requiring more staff for

longer periods of time. Given the scale and complexity of their projects, they are far more likely to use a standardized delivery methodology which results in more projects delivered on-time, fewer project overruns and fewer project cancellations. Because the best firms deploy the best consultants and effectively use Workday PSA to exceed client expectations, every facet of service execution is more profitable.

“With integrated Workday HCM, Recruiting, Financial Management, and Workday PSA, we are able to connect all the dots. We have visibility to time tracking, utilization, expense, billing, and invoicing with reports and dashboards for profit and loss by project, cost center, job level. We have different views of utilization with built-in guard rails for new hire requisitions tied to backlog and pipeline to ensure we have enough work to justify opening a new requisition. This frees up recruiting to focus on finding the best talent without having to worry if the requisition is warranted. Workday PSA helps us eliminate manual processes, staff projects as soon as they are proposed, and increase visibility into project financials and resource demand.” Bobby Riggs

Finance and Operations

Despite their altruism and spirit of giving back to their employees and communities, the High-Performers know how to make money; they are focused on financial success as a vehicle for growth. The Professional Services Maturity Model™ scoring over-weights financial success; meaning the leaders in this survey were much more profitable than their peers.

Table 5 shows the enviable financial results from this year’s High-Performance PSOs. Most notable is annual revenue per billable consultant and per employee. These figures are significantly higher for the high performing firms based on a combination of higher billable utilization, fewer price concessions and better realized bill rates. HPPs do a much better job of planning both revenue and margin. In 2020 business planning and replanning was seriously tested. Despite turmoil and uncertainty, high performing firms were able to plan and course correct to meet their financial goals throughout the challenging year of 2020.

Key Performance Indicator (KPI)	HPP	Rest	▲
EBITDA	18.5%	14.5%	28%
Annual revenue per billable consultant (k)	\$246	\$186	33%
Annual revenue per employee (k)	\$207	\$149	39%
Quarterly revenue target in backlog	50.1%	40.1%	25%
Percent of annual revenue target achieved	98.3%	89.6%	10%
Percent of annual margin target achieved	96.9%	87.6%	11%
Revenue leakage	3.56%	4.56%	22%
% of inv. redone due to error/client rejections	1.6%	1.9%	16%
Days sales outstanding (DSO)	40.5	42.4	5%
Quarterly non-billable expense per employee	\$1,261	\$1,444	13%
Executive real-time wide visibility (1 to 5 scale)	4.02	3.43	17%

Source: SPI Research, April 2021

“For any services firm, customer satisfaction and success are vital to attracting more business. The ability to understand project service demand requirements and match employees to those requirements, while increasing visibility into all operating facets of a project, can be the difference

between having profitable, satisfied customers or at-risk, displeased customers. With Workday’s cloud-based system, we can support our project, finance, and resource management needs with a single, integrated system.” Bobby Riggs

The High-Performance PSOs Use and Integrate PS Applications

Table 6 depicts the level of commercial business application use and integration for top performing organizations versus the rest. In all dominant business applications categories, top performers invest more in business applications and do a better job of integrating them. They are much more satisfied with their application infrastructure.

In professional services, Workday PSA is the core solution to drive operational results. According to the 2021 PS Maturity™ benchmark, 85% of the top performing firms use PSA, and nearly two-thirds have it integrated with the core financial management solution, which gives real-time visibility to all aspects of business development and service execution along with costs. Nearly half of the firms surveyed integrated PSA with the core CRM solution. This integration is important because sales and delivery, must have consistent information to better plan, sell, staff and deliver professional services. Visibility throughout the PSO helps tie strategy to execution with everyone operating with the same information to achieve the same organizational goals.

Table 6: High-Performance Comparison – Business Applications

Solution	HPP	Rest	Delta
Corporate financial management solution (CFM)	95.5%	94.2%	1%
Satisfaction with financial solution (out of 5)	3.97	3.71	7%
Commercial CRM solution	85.6%	82.8%	3%
Satisfaction with CRM solution (out of 5)	4.02	3.98	1%
CRM is integrated with CFM	37.2%	40.9%	-9%
Commercial PSA	85.5%	77.9%	10%
Satisfaction with PSA solution (out of 5)	4.03	3.85	5%
PSA is integrated with CFM	62.4%	50.0%	25%
Level of CRM and PSA Integration	46.0%	38.8%	18%
Commercial HCM solution	76.6%	67.8%	13%
Satisfaction with HCM solution (out of 5)	3.79	3.39	12%
HCM is integrated with CFM	30.7%	31.3%	-2%
Use a commercial BI solution	55.2%	52.9%	4%
Satisfaction with BI solution (out of 5)	3.85	3.67	5%
BI is integrated	43.1%	37.7%	14%

Source: SPI Research, April 2021

Workday Benefits

According to Bobby Riggs, “Collaborative uses Workday to run every component of our business, we have been fully deployed on Workday since 2007, adding new functionality as soon as it is available. Here are a few of the quantifiable results we have achieved:

- **Speed and accuracy of financial close** – we are able to close our books in 10 days compared to 17 before Workday Financial Management with a significant reduction in misstatements and

reclassifications. From day one of our acquisition by Cognizant, we were able to conform to their SOX compliance and public reporting requirements.

- **Low attrition** – based on a litany of things including compensation, merit, learning, time off, project resource staffing, and a transparent job matrix that enables employees to better manage their careers, our attrition is below 5%. The combination of Workday HCM and PSA is incredibly powerful and allows us to have direct line of sight to our resources, utilization, performance, and career management, resulting in extremely low attrition and high employee satisfaction.
- **Utilization** – although our utilization was lower in 2020 due to Covid (high 60% billable utilization), we were able to plan the impact of pandemic-caused project delays to redeploy our resources and invest in more training and certification. Workday allows us to gauge utilization across the portfolio to anticipate demand. This means we are able to start soft booking and staffing projects 30 days before they start, which has a major impact on client satisfaction and cash flow. We always have the right resources on the right projects and can invest in a true workforce pyramid that allows our associate consultants to rapidly come up to speed. It takes us about four weeks for experienced hires to learn the Collaborative way, and about four months for college hire associate consultants to become billable.
- **Exception reporting** – the system identifies anomalies and trends based on our pipeline, backlog, regions, portfolio, and more. We instantly see when a specific job profile is over or under-utilized with a flag to our resource manager to open up new job requisitions.
- **Recruiting and hiring** – growth in a services company is all about effective recruiting, hiring, and training new employees. The powerful integration of the demand side of the business from Salesforce CRM in combination with Workday PSA is directly linked to our HCM and Recruiting applications so we can quickly open new job requisitions and start sourcing candidates. Recruiting is tied to all the major job sites, like LinkedIn. There is a shortage of Workday-certified consultants, so we are always looking for certified resources as well as growing our own Workday talent. Over the past three years we have almost doubled the size of our workforce.
- **Employee engagement** – Workday HCM was the catalyst to create a jobs book with formal job structures and career progression. We offer base and variable compensation that are tied to job roles and MBOs around utilization and individual and team development. We are fully deployed on Workday Time, which allows us to capture time on internal and external projects. We set up over 1,000 new projects a year to capture both time and value. We incentivize non-billable contributions to the business, such as writing a blog article or building out our training environment. Consultants and managers can track job performance with objective merit increases based on contributions and customer satisfaction. We emphasize and support work-life balance.

In Summary

Collaborative Solutions consistently ranks as a top performing Professional Services organization across all service performance dimensions – Leadership, Client Relationships, Talent, Service Execution, and

Finance and Operations. Despite the upheaval and uncertainty caused by Covid-19, the firm continued to excel throughout 2020 and is poised for even greater growth and success in 2021.

Success is in sight for all organizations if they have a clear growth strategy and are able to translate that strategy into action. The comparisons in this case study highlight how leading firms perform, and demonstrates the numbers are not out of reach for average firms. It takes dedication, insight and hard work to surmount challenges and inertia. Change and improvement first require a realization of what is possible. Not all firms know which metrics to track. Nor do they have integrated systems so they can't visualize success, nor gauge the value of improvement.

2020 was a wake up call for businesses around the world, top performers like Collaborative Solutions were able to meet the challenges head on. They planned, replanned, and dove in to take care of their employees and their clients. In turn, their employees stayed committed and persevered despite drastic changes in their work routines. Their clients supported them with more work and additional opportunities. Collaborative Solutions has stayed true to its mission of providing the highest level of Workday expertise for over 18 years. This case study provides insights into how the combination of hard work and visibility spell on-going success in Professional Services.

In sum, Bobby Riggs shared, "At Collaborative Solutions, we are driven by values to not only serve our customers well, but also our employees. As we've grown and matured as a company, we've been able to achieve trust and satisfaction both in business and amongst our workforce, something difficult to accomplish in this demanding industry."

About Service Performance Insight



R. David Hofferberth, PE, Service Performance Insight founder, managing director and licensed professional engineer has served as an industry analyst, market consultant and product director. He is focused on the services economy, especially productivity and technologies that help organizations perform at their highest capacity.

Dave's background includes application and analytical tool development to support business decision-making processes. He has more than 30 years of domestic and international information technology experience with firms including the Aberdeen Group and Oracle. Contact Hofferberth at david.hofferberth@spiresearch.com or 239.304.2998.



Jeanne Urich, Service Performance Insight managing director and co-founder, is a management consultant specializing in improvement and transformation for project- and service-oriented organizations. She has been a corporate officer and leader of the worldwide service organizations of three publicly traded software companies (Clarify, Blue Martini and Vignette), responsible for leading the growth of their professional services, education, account management and alliances organizations.

Jeanne is a world-renowned thought-leader, speaker and author on all aspects of Professional Services. Contact Urich at jeanne.urich@spiresearch.com or 650.703.6593.

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SPI provides a unique depth of operating experience combined with unsurpassed analytic capability. We not only diagnose areas for improvement but also provide the business value of change. We then work collaboratively with our clients to create new management processes to transform and ignite performance. Visit www.SPiresearch.com for more information on Service Performance Insight, LLC.