



## Business Continuity Consulting Firm Improves Management of Business Operations and Strategic Decision-Making with Daptiv PPM

*“Daptiv has become our one stop for managing all projects, financials and business operations—it’s our home for all work.”*

Sean Murphy, President and CEO

### AT A GLANCE

#### KEY FACTS

- Lootok wanted a single software solution to help improve on client relationships, execute on business goals and ultimately make more solid decisions to drive profitability.
- Projects are being managed with Daptiv PPM from start to finish through each project lifecycle, developing statements of work, creating risks and issues logs, generating reports and tracking financials.
- Beyond simply managing projects, Lootok views Daptiv PPM as a true management solution and their home for all work.

*Lootok, Ltd. Uses Single View of its Organization to Increase Profitability and Build Better Client Relations.*

Lootok is a business continuity management (BCM) consulting firm that helps companies build resiliency by developing business continuity programs that are integrated into normal operations and corporate objectives. By focusing on program adoption and incident management training, Lootok motivates employees to develop the skills necessary for managing and responding to threats. Founded in 2006, the company is headquartered in New York, with an extensive network of consultants located across the country.

#### BUSINESS NEED

Prior to early 2009, Lootok had been using a variety of tools to manage projects and business operations, juggling QuickBooks, Outlook, MS Project Desktop, Excel spreadsheets, as well as a central desktop tool. The number of software applications brought a high level of complexity into managing the company’s infrastructure and obtaining a holistic view of its business operations.

“There were just not enough hours in the day to effectively utilize MS Project in conjunction with all of the other tools in place,” says Paul Borchard, Chief Operations and Financial Officer. “We saw potential for a single software solution to centralize sources of all project management and business operations work.”

In addition to increasing operational efficiency, Lootok sought a single software solution to help improve client relationships, execute business goals, and ultimately, help inform their decision making and drive profitability.

“We needed more than just a project management tool—we needed a solution to manage all aspects of our business, from project management to financials and overall operations,” says Sean Murphy, President and CEO.



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Paul Borchard, Chief Operations and Financial Officer

*“In terms of dynamic visibility into what’s going on with the business, we went from zero to one hundred percent... Daptiv PPM has helped us to streamline processes and put our business under a magnifying glass so we can make solid business decisions and deliver on our promises.”*

Paul Borchard, Chief Operations and Financial Officer

## SOLUTION

After evaluating different software vendors for four weeks, Lootok chose Daptiv as a partner. “We really liked the fact that Daptiv PPM is flexible yet robust—Daptiv PPM’s Dynamic Applications give us the flexibility to track and report on any type of business activity or metrics we want,” says Borchard.

Lootok has created numerous Daptiv Dynamic Applications™ to track the metrics that are key to their business. For example, they have a Dynamic Application for expenses that is set up by category to track employee time. From this data, a report is generated each week and automatically sent to the reporting office. Lootok also employs the Customer Intelligence Dynamic Application, which functions as a database to detail each customer’s brand, products and geographical location linked to Google Maps.

Everyone at Lootok uses Daptiv PPM, from the company’s leadership team who manage project scope to its consultants who serve as subject matter experts. By facilitating information sharing, Daptiv PPM’s robust system makes it easy for Lootok’s members to communicate and collaborate as a team—vital for a company that works with a geographically diverse group of both clients and consultants.

This level of internal communication has helped maintain high levels of standardization and consistency in Lootok’s operations, and provided the company with better insight into streamlining processes and managing financial data.

“We’re managing projects from start to finish through each project lifecycle, developing statements of work, creating logs of risks and issues, generating reports, and tracking financials,” says Murphy. “We have visibility into what’s happening in the business like never before; Daptiv PPM is a true management solution.”

## VALUE

Using Daptiv PPM, Lootok has implemented high quality management controls to increase accountability and transparency with its clients, one of which is a Fortune 100 manufacturing company.

“Previously, we would simply invoice our clients for the hours of service the company provided and there was no visibility into the project status to give context,” says Borchard. “Now we have the ability to send detailed Daptiv PPM reports each week to our clients who have commented that they’ve never seen that level of detail given to them from a vendor...they’re very excited. This is helping us to solidify client relationships.” Lootok has even created Web forms to survey clients to gather their feedback and improve upon their experience.

Borchard also adds, “In terms of dynamic visibility into what’s going on with the business, we went from zero to one hundred percent. Previously, obtaining a forward looking view of the business required a time intensive series of documents and calculations, which caused us to be more reactive in nature to business developments. Daptiv PPM has helped us to streamline processes and put our business under a magnifying glass so we can make solid business decisions and deliver on our promises.”

“There has been a huge change in how we manage our projects, particularly from the internal perspective,” says Borchard. “We can look closely at how projects are progressing, analyze numbers to stay competitive and even manage cash and profit ratios. There is now evidence to justify rate increases and hold to budgets and goals as expected.”

In place of multiple software tools, Daptiv PPM has introduced a single solution for managing all aspects of Lootok’s business. “Daptiv has become our one stop for managing all projects, financials and business operations—it’s our home for all work,” says Murphy.



### ABOUT DAPTIV

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering adaptable PPM solutions and expert professional services. Daptiv’s customers include world-class organizations such as Beam, Chase, Coach, Harvard University, Honeywell, InterContinental Hotels Group, and Virgin Australia. For more information about Daptiv’s PPM solutions, please visit [www.daptiv.com](http://www.daptiv.com).