

# Vaco Transforms Its Approach to Workflow Management with Virtual Whiteboards



**Industry:**  
Staffing

**Geographies:**  
29 national offices serving 40+ locations across the globe

**Employees:**  
1,200+

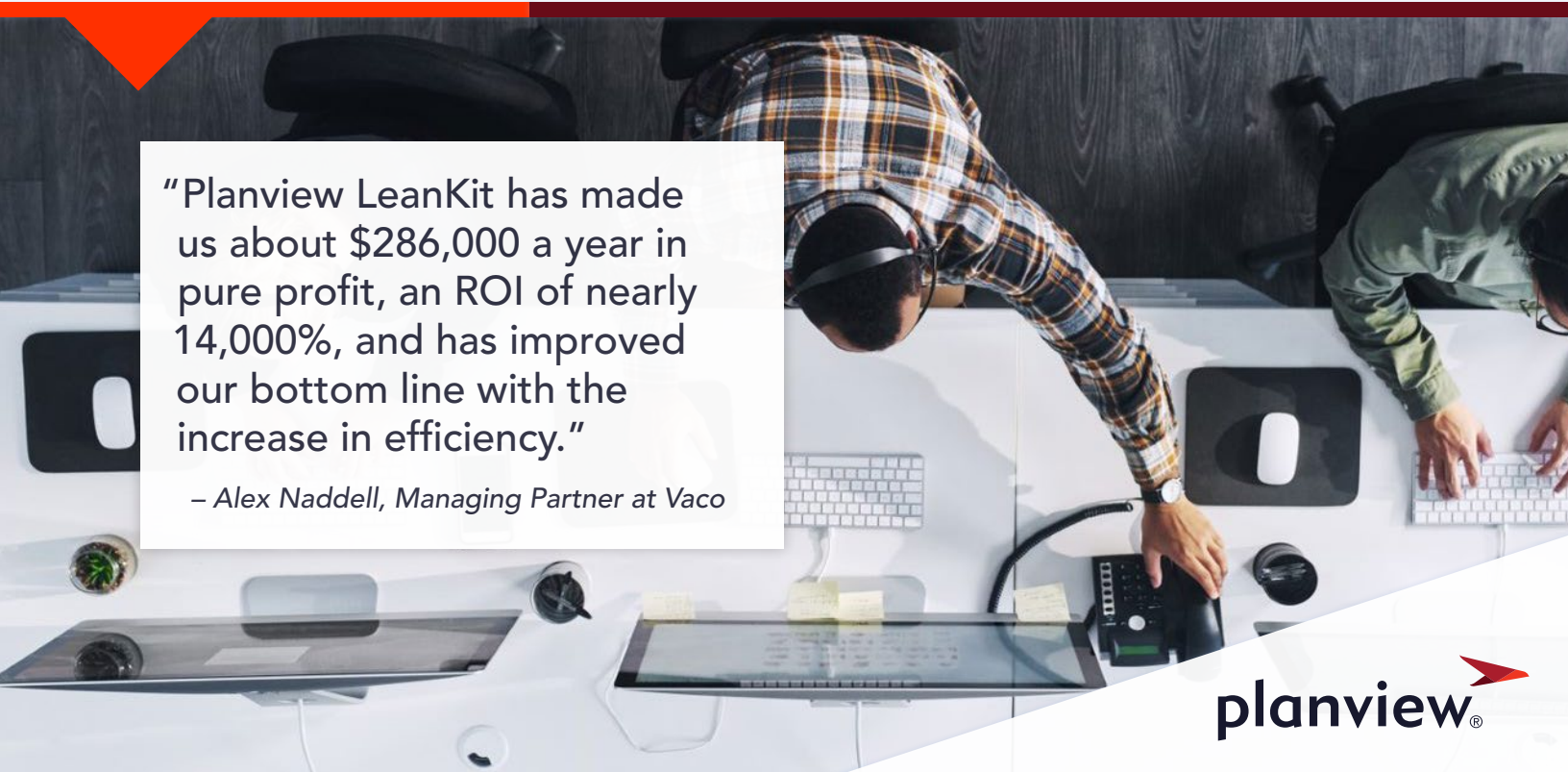
**Planview Product:**  
Planview LeanKit™

## CHALLENGE

Vaco was using seven whiteboards mounted to the wall to summarize their entire workflow. Even though the process of transferring CRM data onto the board and digging for data consumed at least an hour a day per team member, there was never much confidence in the accuracy or completeness of the data. The inefficient process sabotaged productivity and limited the amount of business Vaco could manage.

## SOLUTION

In an effort to centralize data and improve workflow efficiency, Vaco transitioned to Planview LeanKit™, providing team members with an always-accessible, real-time virtual whiteboard that is accurate, comprehensive and reliable. Since implementation, the gains in productivity have led to an astounding return on investment in only a year and given the company a competitive advantage.

An overhead view of two people sitting at a desk with two large monitors. One person is wearing a plaid shirt and a headset, leaning over the desk. The other person is wearing a green jacket. The desk has keyboards, mice, and some sticky notes. The background is a dark wood wall.

“Planview LeanKit has made us about \$286,000 a year in pure profit, an ROI of nearly 14,000%, and has improved our bottom line with the increase in efficiency.”

– Alex Naddell, Managing Partner at Vaco

## About Vaco

Founded in 2002 in Nashville, Tennessee, Vaco partners with clients to complete critical projects and find exceptional talent in the fields of finance, technology, healthcare, risk solutions and administration. Vaco has 29 locally-owned offices across the U.S. and works closely with clients to match professionals on a contract, contract-to-hire or permanent basis. In 2013, Vaco was awarded Inc 5000's "Fastest Growing Companies in America" award for the 7th consecutive year.

## Challenge: Getting Visibility into the True Status of Work

In the staffing industry, tracking work on physical whiteboards is the norm. While rudimentary, it is a simple way of providing visibility into the work everyone is managing. For Vaco Technology, whiteboards were a mainstay. Team members would enter data into their CRM system and then add the same information to one of seven whiteboards - if there was enough room. It was a time-consuming, repetitive process of double-entry that was not only inefficient and unreliable but only benefited people physically in the office. Without current and complete information stored in a central location, Vaco was losing productivity and limiting growth.

## Solution: Upgrading to LeanKit to Streamline Workflow

Alex Naddell, managing partner at Vaco, knew there had to be a better workflow solution that would enable the company to manage its process in a more transparent, centralized and reliable way. "No one liked the whiteboards, but it wasn't until it started impacting our ability to attract and retain talent that we knew we needed to grow up."

Naddell was skeptical he would find a flexible tool that could both support their process and be readily adopted. When he learned about Planview LeanKit, he knew he had found it. "LeanKit is a virtual whiteboard that we can customize to match our specific workflow," he says. "Instead of asking the team to learn a completely new technology, this allows us to stay with what we are comfortable using, the whiteboard, and elevating it to another level."

Vaco integrated LeanKit with its CRM, automatically updating their virtual whiteboards with all of the

information related to a job order. They no longer have to drill down several levels in their CRM system to find, add or edit records and then physically write that information onto a whiteboard. Now, everything is on one screen, accurate, reliable and comprehensive. "My new mantra is 'the boards don't lie'", says Naddell. "It's a great supervisory tool that helps me to easily keep track of everything without having to ask for status updates."

The team quickly adopted LeanKit, believing it to be a massive improvement over static, physical whiteboards that were completely dependent on user motivation and accuracy. Everyone is working from a single source of truth, with full visibility into the actual status of every job order. Because the data is updated in real-time in the cloud, they can pull up their boards on a mobile device in meetings with candidates and clients instead of relying on recall.

## Results: A 13,597% ROI in the First Year

With everyone having instant access to the same, accurate, up-to-date information, the team can find and retrieve information faster, greatly reducing the number of interruptions throughout the day for significant productivity improvements. Naddell says the team is more engaged and can work from anywhere because the virtual boards are always available. "I credit Planview LeanKit with enabling us to scale up the amount of business we can handle and build our team," says Naddell. "Planview LeanKit has made us about \$286,000 a year in pure profit, an ROI of nearly 14,000%, and has improved our bottom line with the increase in efficiency. It has also increased our efficiency, which improves our bottom line. With Planview LeanKit, each team member saves at least an hour a day on repetitive tasks - time they can use building our business."

## Future: Positioning Itself as an Industry Leader

Vaco's ability to provide a virtual workflow solution that enables team members to visualize and share data in real-time from any mobile device has become a differentiator in the industry and given the company a competitive advantage. They are attracting top talent - both in terms of candidates they place with clients and new Vaco employees. As they add talent to their own team, they are able to bring in more clients, creating a continuous cycle of growth.

To learn more about what Planview® solutions can do for your organization, visit [Planview.com](https://www.planview.com).

