

## Case Study 2

# CLEARBRIDGE DIGITAL GROUP

## Digital Transformation Consultancy

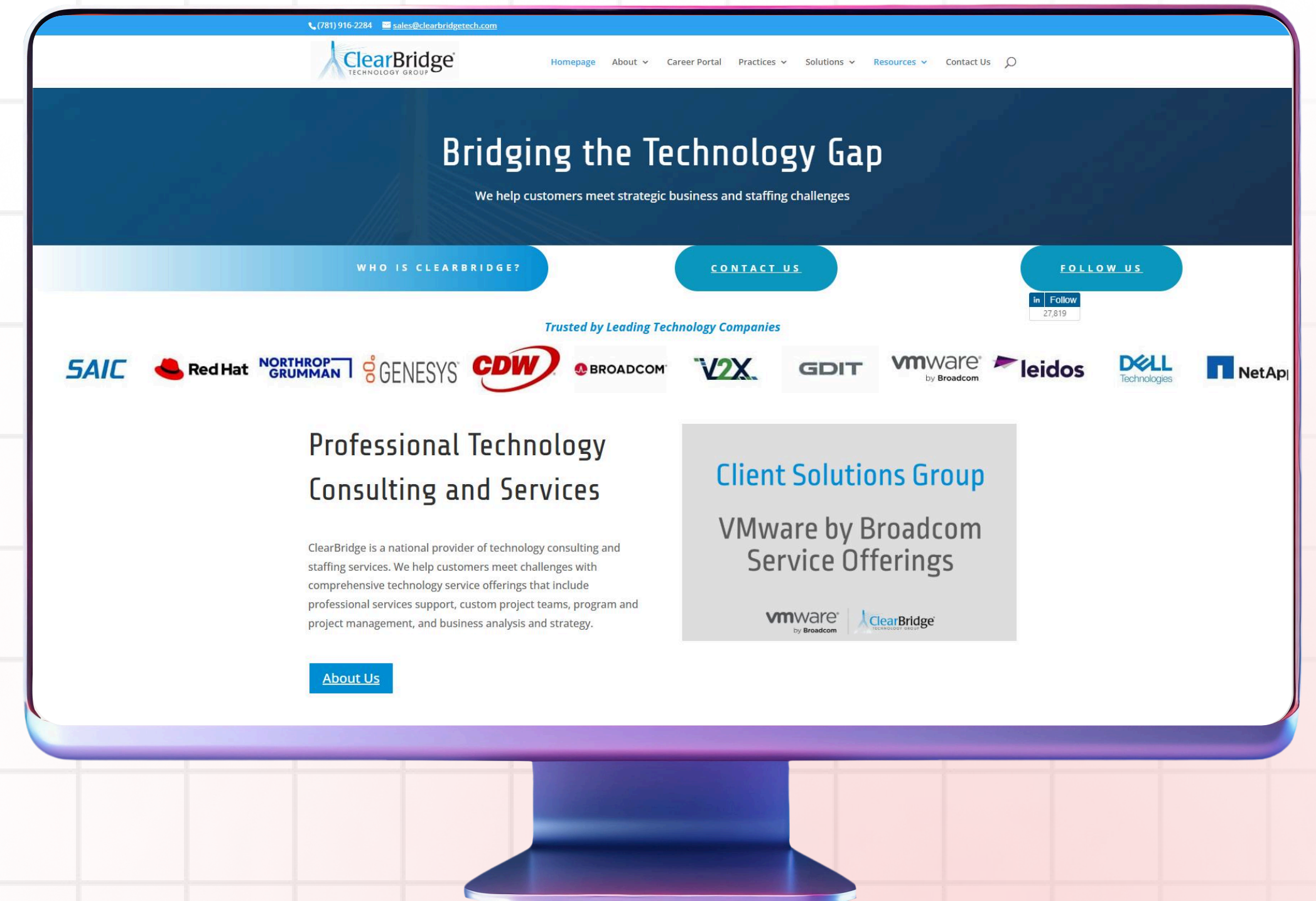
DIGITAL  
SERVICES

CHICAGO, IL

95 EMPLOYEES

LIO · INZO · SIGI

Clearbridge Digital Group Helps Mid-Sized Enterprises Modernize Tech, Customer Experience, And Data Across Healthcare, Finance, And Retail. With 60+ Active Clients, Their Success Depends On Strong Delivery And Clear Reporting. By Late 2023, They Had Scaled To 95 Employees Across Multiple Teams. But Rising Client Expectations Began Outpacing Their Ability To Track, Bill, And Report Effectively.





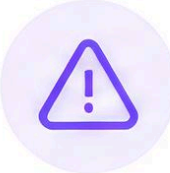

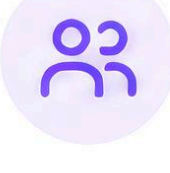
# The Challenge: Complexity Without Visibility

Running A Multi-Client Consultancy At Scale Is An Operational Juggling Act. Clearbridge's Specific Pain Points

Were Both Costly And Reputationally Risky:

We Were So Focused On Transforming Our Clients' Operations That We Neglected Our Own. The Irony Wasn't Lost On Us. We Needed A Partner Who Could Do For Us What We Do For Others.

Serena Whitfield — Managing Director, Clearbridge Digital Group

Pain Area	Impact Before WorksBuddy
 <b>Client Delivery Tracking</b>	With 60+ concurrent engagements, project managers tracked progress in personal spreadsheets. There was no firm-wide view of which clients were on track, at risk, or delayed.
 <b>Time &amp; Billing Accuracy</b>	Consultants logged hours in a separate time-tracking tool that didn't connect to billing. Invoice disputes were common — consuming an estimated <b>12 hours per week</b> in account manager time.
 <b>Scope Creep Management</b>	No automated alerting when project hours approached contract limits. Budget overruns were discovered after the fact, resulting in <b>\$280K+</b> in unbilled work in FY2023.
 <b>Client Reporting</b>	Preparing weekly status reports for each client required 90 minutes per engagement. For 60 clients, this represented over <b>360 hours/month</b> in manual reporting effort.
 <b>Resource Planning</b>	Staffing decisions were made based on informal gut feel. Senior consultants were routinely double-booked while junior staff sat underutilized — a costly and demoralizing imbalance.

# The WorksBuddy Solution

WorksBuddy Conducted A 2-Week Operational Audit Of Clearbridge's Delivery, Finance, And Reporting Workflows Before Implementation Began. The Findings Confirmed That All Three Products - LIO, INZO, SIGI, Were Needed To Address Different Layers Of The Problem.

## Lio: Client Delivery Command Center

- Created A Master Delivery Dashboard Giving All Project Managers A Single Real-Time View Of All 60+ Client Engagements Status, Milestones, Health Scores, And Upcoming Deliverables.
- Built Automated Scope-Tracking Alerts: Lio Monitors Hours Logged Against Contract Budgets In Real Time And Triggers Notifications To Account Leads When Engagements Reach 75%, 90%, And 100% Of Scope.
- Deployed Automated Weekly Client Status Update Templates That Pulled Current Milestone Data From Lio Into Pre-Formatted Reports Reducing Per-Client Reporting Time From 90 Minutes To Under 10.
- Implemented Resource Allocation Views Showing Live Consultant Availability, Skills, And Utilization Rates Enabling Smarter Staffing Decisions Before Projects Begin.



## Inzo: Integrated Time Capture & Accurate Billing

- Consultants Now Log Time Directly Within The Relevant Lio Project Task Inzo Automatically Captures Those Entries And Maps Them To The Correct Client Billing Code.
- Built Automated Invoice Generation Workflows That Assemble Itemized Client Invoices From Approved Time Logs At The End Of Each Billing Cycle Eliminating The Manual Assembly Process Entirely.
- Configured Multi-Tier Billing Rate Logic To Handle Clearbridge's Varied Pricing Model (Different Rates By Consultant Seniority, Project Type, And Client Contract Structure).
- Implemented A Client Payment Portal Integrated With Inzo, Giving Clients A Frictionless Self-Serve Experience For Reviewing And Approving Invoices Cutting Payment Processing Time Significantly.








## Sigi: Firm-Wide Intelligence & Client Insights

- Built An Executive Portfolio Dashboard That Shows Revenue Recognized, Hours Delivered, Gross Margin By Engagement, And Team Utilization All Updated In Real Time.
- Configured Sigi To Automatically Generate Client-Facing Monthly Performance Summaries, Pulling Delivery Metrics, Milestone Completions, And Budget Status From Lio And Inzo Into Branded PDF Reports.
- Deployed Profitability Analytics By Client, Service Line, And Consultant Giving Leadership Clear Visibility Into Which Engagements And Team Members Drive The Strongest Margins.
- Set Up Automated Anomaly Detection: Sigi Flags Any Engagement Where Hours-To-Revenue Ratio Deviates More Than 15% From Historical Norms, Surfacing Potential Scope Or Staffing Issues Early.



## Strategy & Time/Cost Savings

Total Estimated Monthly Time Savings: 560+ Hours. At An Average Billing Rate Of \$145/Hour For Senior Consultant Time, Automated Reporting Alone Recovered Over \$52,200 In Productive Billable Hours Per Month, And Eliminated \$280K In Annual Unbilled Scope Creep.

Phase	Strategy	Monthly Savings
 Standardize	All 60+ client engagements migrated into a single Lio delivery framework — one consistent process, one shared view, firm-wide.	 <b>~80 hrs/month</b> (project admin elimination)
 Connect	Time logging, billing, and project tracking unified via Inzo integration — eliminating data re-entry, disputes, and unbilled hours.	 <b>~120 hrs/month</b> (billing ops + invoice disputes)
 Scale	Sigi automated client reporting and executive dashboards — enabling the firm to handle 40% more client volume without adding headcount.	 <b>~360 hrs/month</b> (manual client reporting)

# Key Results & Performance Improvements

Running A Multi-Client Consultancy At Scale Is An Operational Juggling Act. Clearbridge's Specific Pain Points Were Both Costly And Reputationally Risky:



**89%**

Reduction in  
Manual Reporting Hours



**\$280K**

Unbilled Work  
Recovered Annually




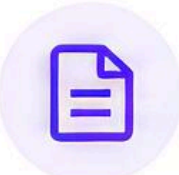







**40%**

More Client Capacity,  
Same Headcount



**560+**

Hours Saved  
Per Month

WorksBuddy Tool	Metric	Result
LIO	 On-time project milestone delivery rate	61% → 91% within 60 days
LIO	 Weekly client reporting time per engagement	90 min → under 10 min
LIO	 Scope overrun incidents	Down 94% (automated alerts)
INZO	 Invoice dispute frequency	Down 87% in 5 months
INZO	 Finance team hours on billing/month	96 hrs → 18 hrs
INZO	 Previously unbilled scope recovered	\$280K+ in FY2024
SIGI	 Executive dashboard refresh rate	Bi-weekly → Real-time (live)
SIGI	 Client portfolio profitability visibility	0% → 100% (per-engagement)
SIGI	 Anomaly detection (budget overruns flagged early)	0 days notice → avg. 11 days early

# Overall Business Impact

The Impact Of WorksBuddy On Clearbridge Digital Group Extended Far Beyond Internal Efficiency. By Reclaiming Hundreds Of Hours Of Operational Overhead, Clearbridge Was Able To Redirect Its Most Valuable Asset, Senior Consultant Time, Toward Actual Client Delivery.

- Clearbridge Onboarded 11 New Client Engagements In Q2 2024 Without Adding Headcount – A Direct Result Of Lio's Capacity Visibility Enabling Smarter Resource Planning.
- Net Promoter Score (NPS) From Existing Clients Improved By 31 Points In 2024, With Client Feedback Specifically Citing The Quality And Timeliness Of WorksBuddy-Powered Status Reports.
- Clearbridge's Gross Margin Improved By 9 Percentage Points In The 6 Months Following Full WorksBuddy Deployment, Driven By Recovered Unbilled Work And Reduced Billing Overhead.
- Three Clearbridge Senior Consultants Who Had Been Considering Leaving Cited The Operational Improvements As A Key Reason For Staying Reducing Costly Turnover.

**"We Brought WorksBuddy In To Solve An Operational Problem. What We Got Was A Competitive Advantage. Our Clients Notice The Difference In How We Deliver, And Our Team Notices The Difference In How We Work."**

**Serena Whitfield** Managing Director, Clearbridge Digital Group

# Why WorksBuddy?

Every Growing Technology Company Reaches An Inflection Point Where The Tools And Processes That Got Them Here Can No Longer Take Them Where They Need To Go. WorksBuddy Was Built For Exactly That Moment, The Moment When Scattered Spreadsheets, Disconnected Software, And Manual Processes Stop Being Inconvenient And Start Being Expensive



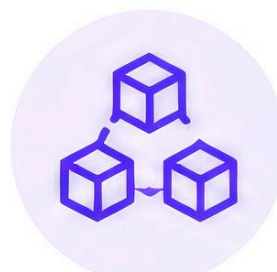
## Purpose-Built for Tech & Digital Services

WorksBuddy is designed specifically for SaaS companies and digital services firms — not adapted from generic enterprise software. Every feature reflects the realities of your industry.



## Implementation in Weeks, Not Months

WorksBuddy's dedicated onboarding team gets your teams live on Lio, Inzo, and Sigi in as little as 8 weeks, with training, configuration, and data migration included.



## One Platform, Three Powerful Products

No more managing multiple vendor relationships, contracts, and integrations. Lio, Inzo, and Sigi are built to work together — sharing data seamlessly so your entire operation runs from one platform.



## Measurable ROI from Day One

WorksBuddy clients consistently report measurable time savings within the first 30 days of deployment — and most see full implementation payback within 4–6 months.