

# IMPACT



WINDWARD

## WINDWARD CONSULTING TRANSFORMS WITH DATA TRANSPARENCY

A FINANCIALFORCE CUSTOMER STORY

RESULTS  
DRIVEN





## ABOUT

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Founded in 1997, Windward Consulting delivers Service Management, AIOps, and DevOps solutions using a unique blend of expert process knowledge, technology acumen and deep operational experience. This combination of skills enables Windward to serve as a trusted partner to a number of the world's leading Fortune 500 companies and federal agencies. Since its inception, Windward Consulting has supported over 500 clients around the globe with more than 3,000 projects.

### INDUSTRY

IT services

### COMPANY SIZE

Medium

### FINANCIALFORCE PRODUCTS

PSA, Revenue Recognition & Forecasting, Accounting

### HEADQUARTERS

Herndon, VA





## DATA SHARED UNEQUALLY

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As happens with many growing businesses, Windward Consulting had developed various data and technology silos across the organization. With data distributed across finance, sales, and other departments, the company found it difficult to confidently and accurately forecast opportunities and risks over the coming quarters.

Additionally, Windward sought a way to protect cash flow by minimizing days sales outstanding (DSO), align all employees to key business growth and profitability metrics, and glean new insights from its disparate data sources—all goals that would traditionally require hiring additional IT and back office staff.



# BENEFITS & BEST PRACTICES

## STANDARDIZING ON A SINGLE PLATFORM

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By standardizing on one end-to-end business platform with Salesforce CRM and FinancialForce ERP and PSA, Windward has reduced IT costs, broken down departmental silos, and gained a complete picture of the business.

## MOVING OFF SPREADSHEETS

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Windward's CEO implemented a strict "no Microsoft Excel" policy. Though initially controversial with accounting staff, the policy encourages the use of dynamic, live reports and actionable analytics.

## TURNING KEY BUSINESS LEVERS

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Digital transformation at Windward has allowed the business to more easily turn key business levers—utilization, average rate structures, and average consultant costs—to improve project profitability.



# OPERATIONAL TRANSPARENCY IS KEY

McDermott sees Windward's digital transformation as a success in large part because he achieved his goal of integrating technologies across the business and opening up access to the data residing in those systems. In turn, this has helped align the organization to the business goals he cares most about as CEO.

With FinancialForce and Salesforce, Windward managers have gained a 360-degree view across opportunities, project backlog, contract details, performance obligations, resource capacity, skill requirements, billing milestones, and even customer satisfaction.



**“PULLING DATA FROM OUR OPPORTUNITIES IN SALES AND ANALYZING WHAT THE FORECAST IS GOING TO LOOK LIKE FOR REVENUE OVER THE NEXT 12 MONTHS IS HUGELY CRITICAL FOR US.”**

Company-wide data transparency has liberated Windward managers to remove the guesswork around a project's status or profitability and make decisions based on data, not hunches. With guidance into which projects to prioritize as well as recommendations for next steps, every team can quickly pull key business levers across sales, services, and finance.





# EXPERIENCE MODERN ERP & PSA

FinancialForce delivers the #1 professional services automation (PSA) and the only customer-centric ERP. We accelerate business value with comprehensive best practices and the most intelligent analytics—all on the leading business cloud platform from Salesforce.



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