

## SUCCESS STORY



### PROFILE

The TDA Group of Los Altos, California meets the marketing communications needs of its Fortune 50 clients through a unique integrated approach to writing, design, and project management. The award-winning firm is known for customer reference programs, product launches, magazines, newsletters, and other custom publishing initiatives. Each of these programs involves multiple steps, and effectively tracking these processes is critical to agency productivity and customer satisfaction.

### INDUSTRY

Marketing, advertising

### QUICKBASE SOLUTIONS

Project Management

### WHO'S USING QUICKBASE

Under the direction of agency president and cofounder Bob Tabke, program managers and creative staff at The TDA Group use QuickBase to save time and increase productivity for agency and client alike. By providing clients with immediate, Web-based access to information about projects, the agency has substantially reduced the amount of unnecessary interruptions.

### Intuit QuickBase

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## QuickBase Powers Uninterrupted Customer Service

### The TDA Group's challenge

- Improve visibility into project status for clients and staff
- Reduce the need for ad hoc status requests
- Enhance the level of service to clients
- Keep projects running on time and on budget

Supplying the creative juice behind many of the marketing programs of Fortune 50 technology companies is demanding work. It requires precise execution and a commitment to quality and rapid turnaround. For the last 20 years, The TDA Group of Los Altos, California, has earned a reputation for delivering just those kinds of services. The company specializes in crafting award-winning custom magazines, eye-catching brochures, compelling case studies, and highly effective direct-mail programs.

Efficiently managing the details of these programs for companies like IBM, Intel, and Sun is critical to success. "Flawless execution is the key to revenue growth for a services business like ours—and productivity is the key to profitability," says agency cofounder and president Bob Tabke.

In recent years, TDA clients have created increasingly complex marketing programs. Along the way, the number of ad hoc requests from clients for project status updates has increased dramatically. "When clients call frequently to check on status, these interruptions take time away from projects, which diminishes productivity for the client as well as the agency," says Tabke.

"Some of our people were spending up to five hours a week looking for information in spreadsheets and e-mail messages to answer client questions," Tabke explains. "This time adds up quickly."

Although TDA staff regularly updated project spreadsheets, Tabke says information in this format was only sent to clients weekly or bi-monthly for regularly scheduled meetings. "Having to scour spreadsheets for project details on a daily basis would waste client time," he says. "Yet these companies also want up-to-the-minute status about certain details. We needed a better and less time-consuming way to report this information."

### The Solution

- Web-based access provides real-time visibility into projects
- Automatic task reminders keep projects on track
- Alerts speed billing process by providing project details

TDA needed a Web-based real-time reporting tool that could provide standard project status reporting functions and scale as client needs increased. Ease of use and customization were requirements, says Tabke. "We knew that once clients saw up-to-the-minute views of their projects they would want more features. Any tool we chose had to continuously add value to our programs, and do so without requiring us to hire programmers."

"We also needed a remote hosted solution, as we did not want to create IT complexity at the agency," Tabke adds. "And the tool had to be constantly available, because we rely on having access to the most current information in order to run our business. Lastly, we wanted a tool we could brand with our look, feel, and logo to reinforce the value of our services."

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THE OVERALL EXPERIENCE

*“Intuit QuickBase met and exceeded all our requirements for a real-time project management system.”*

*—Bob Tabke, president and cofounder, The TDA Group*

One of TDA’s program managers had used Intuit® QuickBase® in the past and showed the diverse features and functionality of the product to the team—the demonstration quickly convinced Tabke to make the purchase. “Intuit QuickBase met and exceeded all our requirements for a real-time project management system,” he says.

After deploying QuickBase, TDA program managers created what is now called the “TDA Client Access” (TDAC) application in a few hours. With the tool in place, agency staff now organizes, tracks, and shares information through easy-to-understand reports and dashboards. Additionally, clients can access their program information immediately.

The amount of time required to train clients and staff to use the product was minimal. Tabke explains, “We held one-hour introductory sessions with our clients, but QuickBase is so straightforward they could have figured out how to use the tool without us.”

Another benefit is how quickly QuickBase can be customized for specific client requirements. “Our project managers can modify the QuickBase application for a new client in a couple of hours,” Tabke says. “This enables us to quickly ramp up new projects.”

QuickBase also met the budget requirements of the midsized agency. “Because QuickBase is a Web-based application, we did not need to worry about the time and cost of implementing and maintaining a traditional software package,” Tabke says.

Tabke and his colleagues are impressed with how well QuickBase keeps vital information secure. Role-based security features keep agency information within TDA—and grant external access to account information appropriate to each client.

**The Results**

- [Reduction in ad hoc requests boost employee and client productivity](#)
- [Immediate access to status reports increases customer satisfaction](#)
- [Agency-branded reports remind clients of agency value](#)

With the advanced customer service capabilities of QuickBase, clients now view the agency as a strategic partner rather than just a service provider. “Immediately accessible, single-screen overviews of individual projects and entire engagements help us provide clients with critical information that can affect marketing plans immediately,” Tabke says. “And because our clients are leaders in the IT industry, they appreciate the real-time visibility QuickBase provides.”

In addition to saving clients time, QuickBase also enhances productivity in other ways. Tabke explains, “Here at TDA, QuickBase provides us with a logical project framework that covers everything from article layout in a corporate magazine to obtaining legal approvals for product success stories.”

The ability to tailor program management tools for the needs of each client helped reduce the amount of time TDA staff spend responding to client requests from five hours a week to an hour a week. “These time savings add up and help us keep costs down for our clients,” Tabke says.

The ability to quickly customize QuickBase has become a competitive differentiator for The TDA Group, according to Tabke. “Branding QuickBase as the TDAC application reinforces the importance of our capabilities,” he says. “Seeing up-to-the minute project information presented with our logo reminds our clients we are dedicated to providing all the marketing services they need—in the most efficient way possible.”

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