SUPERIOR RESOURCE MANAGEMENT WITH KANTATA

Fintech Firm Gains New Operational Insights and Leaps in Efficiency

Core10 is a leading North American-based provider of banking and lending products and professional services. Core10 specializes in API integration and SaaS implementation services to provide financial institution and financial technology clients with customized solutions to meet specific needs. Core10 also provides a deposit account opening and digital lending platform, called Accrue, which is designed specifically for community banks looking to accelerate digital innovation.

Challenge

The company chose the Kantata (formerly Mavenlink) resource management solution. Purpose-built for professional services firms, Kantata could integrate tightly with Core10's existing systems, improve automation and deliver better operational visibility. Equipped with skill accessor tools for project availability, advanced reporting, budgeting and invoicing tools, as well as an activity feed, Core10 was confident it could scale up with Kantata.

BTM Global was selected to lead the Kantata implementation and integration with HubSpot and QuickBooks, as well as the data migration from Core10's legacy systems.

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QUICK FACTS

➤ Consolidated the work of many systems onto the centralized Kantata solution

➤ Saved hours of time each week with task automation

➤ More accurate project fore-casting and better resource utilization

"Kantata understands our industry and the complexity of offering both services and products. BTM Global was a great implementation partner because they moved quickly to get us integrated and live. We appreciate everyone's consistent and transparent communication," said Danielle Addicott, senior project manager, Core10.

Project Results

With Kantata, Core10 consolidated and streamlined the work of many systems into one platform. The improved automation and visibility have fueled better performance both within the office and for client services.

- The Kantata Activity Feed serves as a central hub of documents, such as stakeholder documents, emails and SOWs. This simplifies and streamlines information, lessening the need to access multiple systems.

- Customizable reports and insights are tailored to each team's needs, from project managers to the C-suite.

- Clearer insight into employee work and timelines allow for more efficient project assignments and superior client service.

- Improved reporting and project forecasting has increased resource utilization.

"Our expectations for Kantata have been proven out," said Addicott. "The functionality has been outstanding. Activities that used to require multiple systems and reports now can all be achieved within Kantata, such as expense reports, onboarding and offboarding, and annual reviews."

Manual, time-consuming processes were reduced thanks to Kantata's superb integration and automation capabilities.

"There was a two-step process I had to do weekly, which involved data entry and comparing data between HubSpot data and our legacy system," said Kelly Leonard, marketing specialist at Core10. "With Kantata, we can just update the information in one place and we know it's accurate everywhere. That's freed up at least an hour of my time per week to focus on other priorities."

As a user of Kantata (formerly Mavenlink) itself, BTM Global offered real-world experience that guided Core10 through configurability options, best practices, and the building of custom reports to give the team maximum visibility and control.

"I appreciated that BTM could identify ways we could improve our existing operations," said Leonard. "For example, they suggested ways we could work more efficiently in HubSpot to make our tasks easier. They weren't just there to get the job done; they helped us streamline our current operations. That was a big value-add."

Find out more at btmglobal.com
Contact us at 612-238-8800

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