case study

CORPORATE SPENDING INNOVATIONS | Edenred   BARKLEY

CSI AND ACCOUNTABILITY HELP BARKLEY TRANSFORM INTO A DIGITALLY CONNECTED AGENCY.

What if decision-makers in your creative agency could instantly access the insights they need to improve operational efficiency, create winning client campaigns, and drive revenue growth?

Barkley is making that vision a reality.

The fast-growing creative agency has transformed into a digitally connected agency by migrating to the cloud, upgrading its enterprise resource planning (ERP) application and other IT systems, modernizing its workforce and security infrastructure, and electronically paying its suppliers.

INSIGHTS THAT DELIVER SUCCESS

Barkley is an independent, creative idea company with offices in Denver, Kansas City, New York, and Pittsburgh. The agency has a wide portfolio that includes strong retainer categories like consumer-packaged goods, financial services, health care, restaurants, retail, and travel and tourism.

Since 2018, the creative agency has nearly doubled in size.

Leveraging its unique insights into consumers is a big part of Barkley's tremendous success.

That's why Lambert Tomeldan knew he had to find a way to better align Barkley's information technology initiatives with its business growth strategies when he became the creative agency's senior vice president of technology and head of information technology in 2016.

After an assessment of the IT group's technology, organization, and needs, Tomeldan concluded that the function needed an overhaul. He architected a plan to future-proof the company's IT function with new technologies and partnerships. The next step was to convince the agency's C-level execs and board to approve the approximately $4 million plan. He worked with the agency's director of financial planning and administration (FPA) to develop a financial model that detailed the long-term costs of the creative agency's current systems, and the potential expense of a catastrophic failure.

"There already were systems that were failing," Tomeldan noted.

Rather than overwhelm leadership with minutia, Tomeldan used just three PowerPoint slides to detail the magnitude of the problem and how digital transformation would support the agency's growth. He also provided leadership with a timeline that graphically illustrated the project's milestones.

"It was a 'shock and awe' presentation," Tomeldan recalled.

While Tomeldan admits that the approximately $4 million investment gave the leadership team some "sticker shock," it was clear that maintaining the status quo would "set the agency up for failure."

FROM THE GROUND UP

Tomeldan's first initiative was to partner with Cisco Systems to modernize Barkley's network infrastructure across the three locations it had at the time. The network would provide a strong foundation to support the agency's expansion. Barkley also partnered with Dell to update its server, cloud computing, and disaster recovery infrastructure. "It gave us peace of mind," Tomeldan noted.

After successfully completing the creative agency's infrastructure investments, Tomeldan and his team turned their attention to transforming Barkley's workforce and security infrastructure.

Balancing the freedom that creatives want while doing their jobs with the need to mitigate the agency's potential risks was one of the biggest challenges with the security transformation project.

"Creatives don't want any barriers," Tomeldan said. His team partnered with CrowdStrike and other technology providers to implement tools to monitor and protect the intellectual property that the agency creates for all its brands. Tomeldan's team also developed security awareness training.

Moving forward, Barkley also plans to become Payment Card Industry Data Security Standard (PCI DSS) compliant to safeguard the sensitive customer data that it collects through its email marketing and other initiatives. Healthcare and finance represent a significant portion of Barkley's business.

DIGITAL CONNECTIVITY

Finding ways to improve the way that Barkley's workforce operates is a critical part of the agency's digital transformation initiative. Workforce transformation is Barkley's largest digital transformation initiative because it impacts people, processes, and products across the creative agency.

As a first step in its workforce transformation initiative, Tomeldan's team assessed the agency's processes, staffing levels, and the tools available to employees.

An early conclusion was that the agency had outgrown its ERP application. After an evaluation of available solutions, Barkley implemented the ERP from Accountability – a modern, web-based solution that would provide long-term efficiencies for the agency's users, Tomeldan explained.

Importantly, Accountability is integrated with the agency's other workforce transformation solutions to remove data silos, and help the agency achieve its goal of becoming digitally connected. "We want to use the data the agency creates all the time to provide answers to our users' big questions."

For instance, Accountability is integrated into Barkley's Adobe Workfront platform for project management. Projects are now automatically created in Workfront as contracts are signed.

Through these types of integrations, the Accountability ERP has become a centralized hub of information that provides users with the insights they need to make informed decisions. "Accountability is where we run the agency, especially financials," Tomeldan said.

"Accountability helps agencies become connected," said Accountability President Judd Rubin.

Barkley achieved additional operational efficiencies and created new value for the agency by automating its payments to suppliers with CSI Edenred. A single file seamlessly uploaded to CSI from Accountability is all it takes for Barkley to effortlessly pay suppliers in their preferred payment method. Barkley also can earn rebates on payments made via card. And CSI Edenred provides Barkley with visibility into the status of payments and auto-reconciliation with Accountability.

A FOUNDATION FOR AGENCY GROWTH

The insights provided through Barkley's digital transformation efforts and its migration to the Accountability ERP and CSI platform are helping Barkley manage its day-to-day operations more efficiently and make better informed decisions that deliver client value and drive agency growth.

"We've made a ton of changes over the last five years," Tomeldan said, quickly adding that integration and development will never end. "We will always look for improvements."

He credits Barkley's transformation into a digitally connected agency to choosing the right partners, such as Accountability and CSI.

"You can have the best idea in the world, but you won't be able to achieve your vision without the right partners. We are glad to partner with Accountability and CSI."

- Lambert Tomeldan, SVP of Technology