TriLumen Systems

CASE STUDY

B2B Marketing & Consulting Agency · 45 Staff · Scope, Capacity & WIP

Catching Scope Creep Before It Eats the Margin

THE CHALLENGE

A growing 45-person agency was losing margin it couldn't see. Account managers gave away extra scope to keep clients happy, creative directors were booked at 140% while junior copywriters sat underused, and finance didn't find out a project was underwater until 30 days after month-end close.

OUR APPROACH

A scope alarm at 85%. When logged hours on a deliverable hit 85% of budget before final review, the account director is notified and a draft change order for the client is ready to send.

Capacity four weeks out. A weekly forecast shows staffing gaps a month ahead, so leadership books freelancers early instead of burning out the senior team.

WIP that posts every day. Work-in-progress revenue is calculated and pushed to the ledger daily, so project health is visible while there's still time to act.

Clear lines between systems. Project management owns the work, accounting owns the money, and the rules between them are enforced automatically.

THE RESULT

78% less
Unbilled scope leakage

81%
Sustainable average utilization

5 days → 1 afternoon
Month-end financial reporting

Scope problems surface while they can still be billed, staffing is planned before it's a crisis, and margins are predictable month to month.

> *"We used to find out a project went underwater three weeks after the client paid the final invoice. It was a massive blind spot. Having a system that taps us on the shoulder when a scope hits 85%, and drafts the change order automatically, has stopped the bleeding. Our margins are actually predictable now."*
>
> MANAGING PARTNER, B2B MARKETING & CONSULTING AGENCY

Have a Problem That Looks Like This?

(570) 392-9116 | hello@trilumensystems.com
trilumensystems.com/case-studies