Managing Consulting Projects with Evernote Business

"Since implementing Evernote Business, the time it takes for my team to carry out a project from start to finish has been cut by half."

Péter Tóth-Czere | Co-Founder & Chief Content Officer, Coffee Break

Coffee Break is a Hungary-based boutique digital marketing agency that provides consulting services to SMBs and multinational corporations around the world.

Keeping teams on the same page

Shortly after co-founding Coffee Break Consulting, Péter realized that he was going to need a central place to manage his entire team's projects. Coffee Break does not have a physical office, and the core team works from different cities across Hungary. Therefore, it was crucial to have a project hub where teammates could collaborate and keep each other up-to-speed. As an Evernote Premium subscriber, Péter found the solution to his problem in Evernote Business—a natural extension of the tools he was already using.

Organizing with shared notebooks, note links and tags

Evernote Business helped Péter and his team manage client information, organize projects and research, and avoid a major challenge—accidentally duplicating work across the team. Project details for all clients are kept in Evernote. For each client, the team creates a dedicated notebook. Each notebook contains a "Table of Contents" with links to all the work and research related to the client. Thus, anything concerning a project for a client is only a click away.

To date, the team has created over 1,000 notes. To facilitate the finding of information, Péter, as the Evernote Business administrator, has pre-approved a set of tags for the team to use. For example, a research article on marketing that is relevant for the client Buda and the project Pest would be saved as a note with the tags "#marketing", "@Buda", and "$Pest". The symbols #, @, and $ denote 'topic,' 'client name,' and 'project name' respectively.

Double Productivity

Since implementing Evernote Business, Péter estimates that the time for Coffee Break to carry out a project from start to finish has been cut by half. Team members no longer need to search for emails or documents in their CRM or other cloud services. Everything is accessible from the "Table of Contents" notes they create or by using their tagging nomenclature. When the need arises, the team easily keeps internal and external stakeholders up-to-date through checklists and status notes, thereby also reducing the time spent following up on tasks.

Industry

Consulting

Size of Company

<10 employees

Share with anyone

From sharing a single note with an individual to sharing an entire notebook with the company, Evernote makes it easy to show your work to whomever you need to—even if they don't use Evernote.

Avoid duplication of work

Evernote's Context feature surfaces relevant notes and notebooks your colleagues own, ensuring you never lose time working on a task that someone else has already completed.

Easy administration

From the admin console, Evernote Business administrators can easily manage users, business notes, notebooks, and tags.