

Organize Your Workflow and Prioritize Growth



CPM ADVISORY GROUP, NEW JERSEY

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BACKGROUND

CPM Advisory Group is based out of New Jersey and provides its clients with a comprehensive finance department that helps startups manage the fundraising process. The firm currently services early-stage, venture-backed clients across the U.S. and has experienced rapid growth over the past year. Given the pace of CPM's growth, they were looking for a solution that could scale with the Company and serve as the hub for all their client deliverables. We spoke with Chris Mossa, CPM Advisory Group Founder & CEO, and Roxanne McBride, Director of Client Operations, to see how they use the software.

HOW CANOPY IMPACTED ORGANIZATION

The firm's organization methods have improved drastically since implementing the software. They went from using sticky notes and written entries in a journal to Canopy. While they still may jot down a note here and there, all client notes can now be centralized within the software.

"It's having a single source of truth for everything that's going on around the company, and everything that we've signed up to do, all the commitments that we've made to various clients," Chris explained. "It's the hub. So, if I want to see everything that we've committed to and what everyone's working on, I have one place to go."

WHAT FEATURES HAVE HELPED YOU STREAMLINE YOUR WORK?

The task dashboard and templates feature is what's made the biggest difference in work life at CPM Advisory Group. Tasks and templates have made it easy to stay on top of incoming work, according to Roxanne.

"I really started with the tasks and the templates and that was really easy," she said. "For me and my team, it makes it easier to collaborate and delegate."

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– CHRIS MOSSA, FOUNDER AND CEO



Being able to balance workload and keep her team on track is how Roxanne has used Canopy to improve workflow at the firm.

“A lot of my work is repetitive and transactional, so being able to assign specific tasks to other people, and then using that as the kind of hit list of what we need to get through in a day ... is how I use it,” she said.

Project management got a lot easier with Canopy, since Roxanne and Chris are now able to see what everyone is working on, track their progress, and use that information to refine their pricing strategy. Being able to bill their time using the flat rate option within the Time & Billing module has been very helpful as well, Roxanne noted.

“Having the flat rate option in Canopy where we can build our revenue schedules on a flat rate and then track our time hourly, that was a differentiator. Most other solutions wanted everything digested, or broken down into hourly which just doesn’t fit us,” she explained.

LOOKING FOR A SOFTWARE THAT GROWS WITH THEIR GROWTH

CPM Advisory Group has big ambitions when it comes to their future and they are in full on growth mode right now as they work toward their goals. They were really looking for a software that was able to grow with them. The last thing they wanted was to be forced to implement another software in a few years when they are bigger, Roxanne said.

“One of the other reasons that I liked Canopy is it’s something we can grow into,” she explained. “We’re not ready today for the client portal, but when we get to the size and scale where we are, I don’t want to have to uproot our whole ecosystem just because we need a client portal.”

Overall, Canopy has helped CPM Advisory Group stay organized and manage tasks while they work on growing their client base.