BLOG

Operations, People Ops

Why We Left Tempo Time Tracking for Harvest

Ivan Stegic — February 12, 2020

When a company starts out, its growth is organic, and much of its functioning is reactionary. But in order to grow more proactively, you need to put plans in place. At TEN7, we've excelled at servicing our clients. However, I've wanted to be more growth-minded, planful and regimented in the future business and work we do.

I've taken a few different approaches to doing that. I've tried to plan "resources" with spreadsheets. That hasn't worked. We use Jira for tracking time to tickets, so we tried using Tempo Planner, the part of Jira that allows you to, in theory, schedule people. Unfortunately, the Tempo user experience is tied to how Jira works, and from a user experience perspective, is extremely prescriptive. Any plugin to Jira (like Tempo), is limited by how Jira works.

When you have a hammer, everything looks like a nail, and for Jira, everything is centered around issues. They make sense for things like billable development time, but how do you track administrative time, meeting time, or creative work that isn't attached to an issue?

Last year, we hired a Customer Success Manager to help us become operationally better. We spent time looking at different software options to optimize our planning, and so we decided to give Tempo planner another try. Well, it didn't work any better than the first time we tried. So, now what?

BUREAU OF DIGITAL TO THE RESCUE!

On a monthly Bureau of Digital call with the group I became part of after Owner Camp last year, I asked, "What software are people using to plan and forecast for their business?" And 75-80% of people said Forecast. I'd heard of it, and thought it looked pretty good. I wondered if I could make Forecast work with Tempo. The more I looked at Forecast, the more I thought *OMG this looks amazing, and it does everything I want it to do.* Based on these observations and the vote of confidence from my colleagues, it seemed to make a great deal of sense to try.

I also asked my Bureau peeps about time tracking. Harvest was recommended almost unanimously. I took a good, long look at Harvest. It was going to be a big deal to switch time tracking software… could I make Tempo work with Forecast? Was it worth the effort? Why would we want to Frankenstein an integration like that anyway? We need Forecast, and it would make sense to use the software that integrates with it tightly, which is what ended up driving us to Harvest.

NEW YEAR, NEW TIME TRACKER

So we switched over our time tracking from Jira's plugin Tempo to Harvest at the beginning of 2020, a nice clean transition time. In December of 2019, I dug into the Harvest app and came up with a demo for the team. I didn't need to do much, as the user experience for Harvest is really intuitive. I had to spend some time figuring out the categories for everything and deciding how things would be migrated from Tempo. After all, to be able to use Forecast, we would need some historical data. I ended up importing the last half of the year's worth of time into Harvest to set ourselves up for making data-driven decisions in Forecast.

The transition to Harvest was smoother than I anticipated! The feature set makes it nice and easy to use and I was able to integrate Harvest directly into Jira. For tracking time to Jira issues, there's now a Harvest widget on each issue page, instead of the Tempo widget. And once you start a Harvest timer from a Jira page, that time entry also appears on your Harvest time tracker list for the day, so you can start, stop and edit an entry very easily from wherever you access Harvest (and there are many ways to do so!).

WHAT I LIKE

- **No more fake issues!** We can log time to the project without having an issue in Jira that it is assigned to.
- **Modern, intuitive user interface:** As users, I think we've become quite sophisticated and discerning. If a bad user experience is a struggle, adds time to my day, and I don't feel like using it, I'm probably going to put it off. Whereas if the interface is beautiful and easy to use, it just gets the thing done.
- **It's available everywhere!** You can use it from the Harvest website. You can install it as an extension in a browser. You can install a desktop version. You can use it from a mobile app. You can launch the timer from within an issue in Jira.
- **Reports**: Tempo reports were scientific and data-driven, which I obviously like. Reports in Harvest are juicy and amazing. Harvest reports give me all the data that Tempo did and more! For example: I can see at a glance what my team's capacity is for the number of hours we have available to the week, and it's connected to whether someone is in or out of the office in Forecast. Let's say I know my team's capacity is 420 hours for this week. It's Tuesday morning and I know we've already worked 55 hrs in the week. Of them, 41 hours are billable, 13 non-billable. That stuff is really easy to see. I have a graph. I really like that.
- **Project Budgeting**: Let's say I set a project in Harvest to have a $20K budget. When I look in Harvest, it will tell me how many hours we've spent, how much of the budget we've used, and then it will tell me, based on the current forecast of who we have on the project and how many hours they're going to be working in the future, whether we'll be over or under budget. That's really sexy.
- **Accounting integration and invoicing**: We use Quickbooks to keep track of our business finances. We also use it to send out invoices, and clients either pay us online or send us a check. Invoicing used to be a pain: we had to generate reports in Tempo, export them into a spreadsheet, and then manually generate invoices in Quickbooks. Harvest is integrated with billing, and I love that! I can very easily use Harvest to directly invoice our clients, just like we did using Quickbooks, only now there is no intermediate step of an export out of timekeeping and import into the invoicing system. There's an easy "sync with Quickbooks" button that lets me push the information out of Harvest and directly into Quickbooks when I need it.
- **Cheaper payment portal:** We'll save more than $1000 a year by using Stripe, the online payments processor that Harvest is integrated with, versus using Quickbooks merchant services.
- **Retainers**: When a client pays for their support agreement a year in advance, we technically draw against this retainer on a monthly basis. There was no way to easily track this in Quickbooks, but Harvest has this built in. It works for us!

So, that's the short and sweet post about our transition to Harvest! So far it's doing everything we need it to do.

I'm still playing with Forecast; I haven't fully wrapped my head around it yet. But when I do, I hope to follow up with another post.

Want to Try Harvest?

Use this handy referral link to get 30 days free and a discount on your first month!

Ivan Stegic

CEO

Words that describe Ivan: Relentlessly optimistic. Kind. Equally concerned with client and employee happiness. Physicist. Ethical. Lighthearted and cheerful. Finds joy in the technical stuff. Inspiring. Loyal. Hires smart, curious and kind employees who want to create more good in the world.

BLOG POSTS

Development, DevOps, Security

Why Are SSL Certificates Important?

Ivan Stegic — January 29, 2020

READ NOW

Case Studies

Case Study: Bloomington Public Schools - The Hub

Ivan Stegic — September 12, 2019

READ NOW