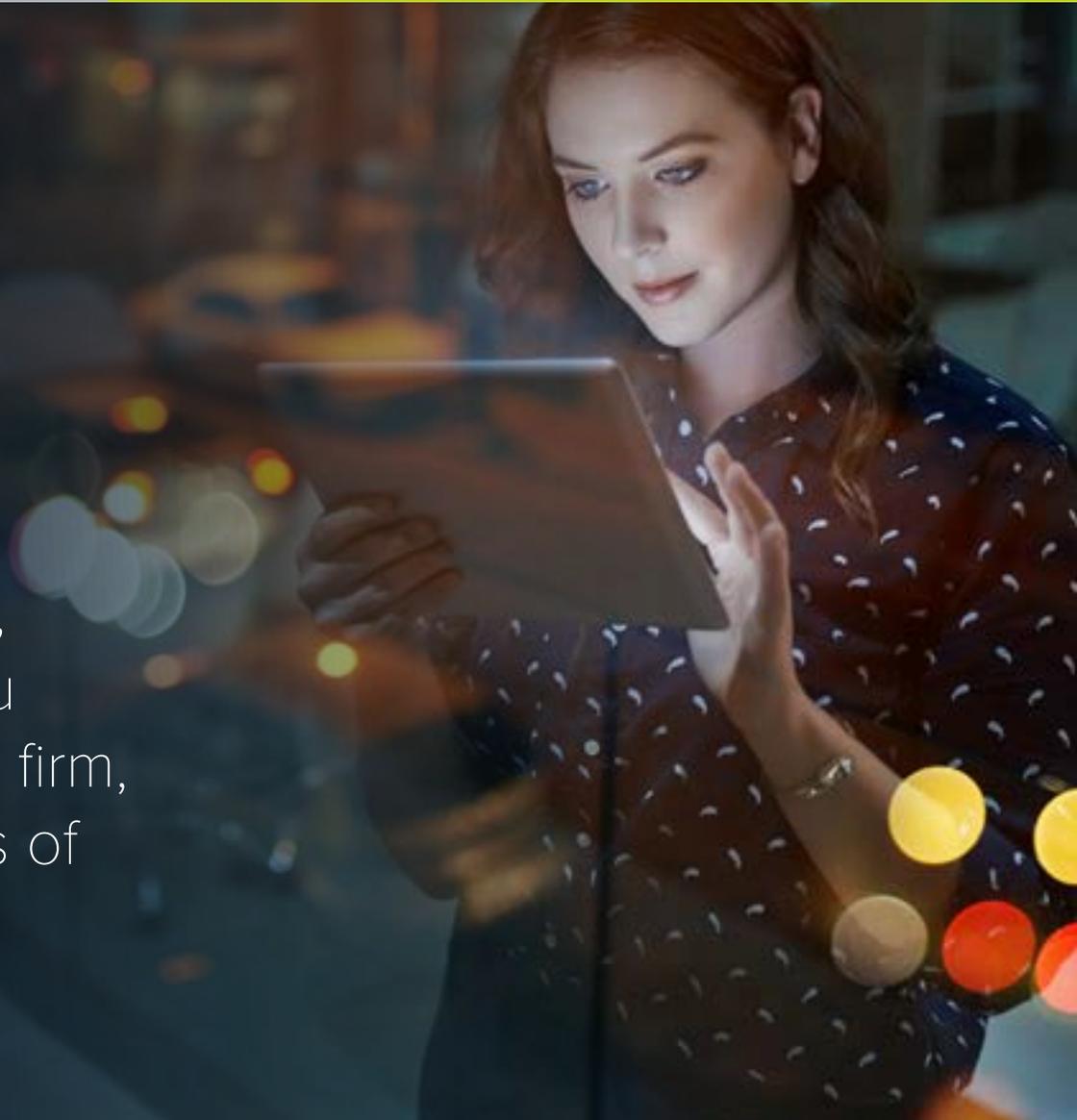# Boost your profitability

If you've been experiencing the frustration of juggling multiple tools, solutions, and platforms to help you manage your professional services firm, you'll appreciate the seamlessness of the Unit4 PSA Suite.

Contents

Standardize, simplify and optimize your business processes

The information in this e-Guide is provided to support those professional service managers, who wish to build their business case for implementing a comprehensive professional services automation solution in their organization.

UNIT4

Accelerate your organization

How can you increase the performance of your professional services organization?

- Focus on building and acquiring talent
- Deploy easy-to-use tools to increase productive time
- Ensure that everyone understands what needs to be accomplished for each client by when and within what budget
- When the project is completed, you need to accurately invoice for services rendered and ensure timely collection of those invoices.

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There's much to be accomplished

There is a lifecycle to every project...

It begins when a new requirement is identified, either at an existing client or a new one, and it enters into the firm's opportunity funnel. Here it is cultivated by the partners who take it through each step of the sales cycle from defining the need, ascertaining the timeframe and budget, through to developing the solution and achieving agreement. And then begins the actual project!

Projects, in turn, are composed of specific activities, each of which contributes to the successful achievement of fulfilling the original requirement. This process begins with strategic planning, then tactical planning, then establishment of a committed timeline, after which the actual execution of the project is performed. From project inception to final billing, each activity in the project, and the entire project itself, will be considered completed when they are accurately:

✓ Targeted ✓ Deployed ✓ Captured ✓ Billed ✓ Defined ✓ Measured
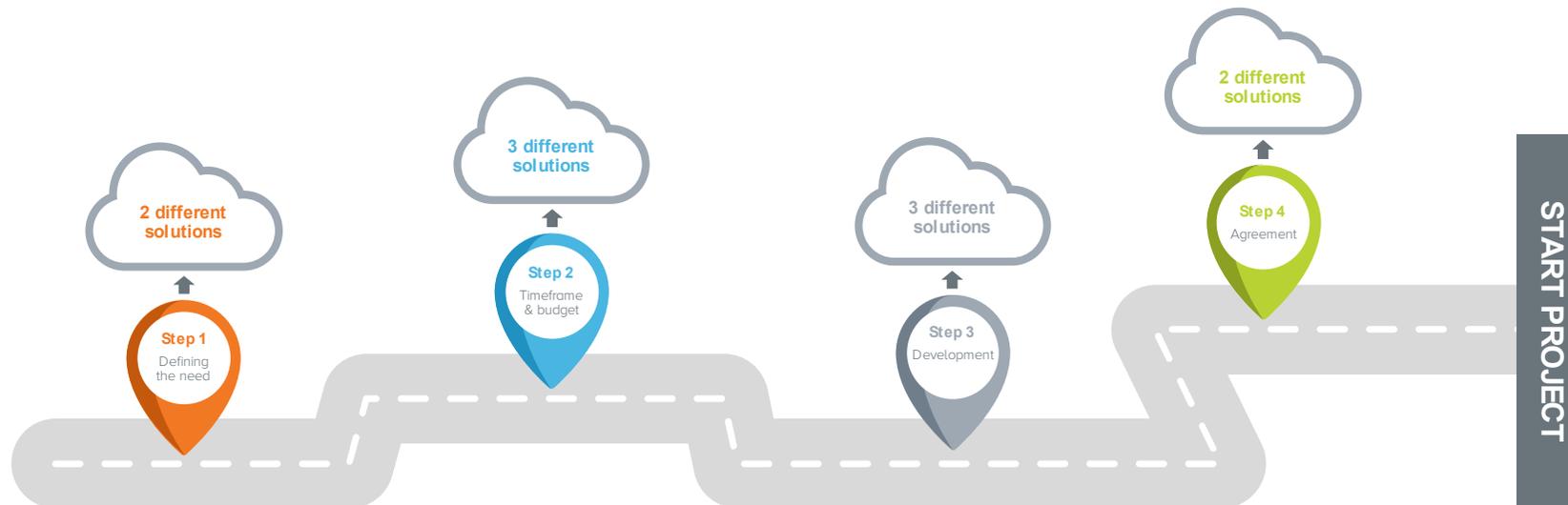✓ Documented ✓ Collected

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How many different solutions?

Have you stopped to think about the number of different solutions your organization currently uses to manage all of this?

Almost every company has an invoicing solution, a solution for time and task tracking, as well as project management software. Many have different solutions to manage resources, assets, and expenditures. Some even add opportunity tracking software and marketing automation software to this list.

Each of these solutions may come from a different software provider, or may even be informally developed internally using spreadsheets or database products. Some are still using manual systems based on forms filled out by hand, or submitted notes.

Multiple solutions and manual systems, reduce the potential productivity and profit performance of all of these activities and more.

2 different solutions

3 different solutions

3 different solutions

2 different solutions

Step 1
Defining the need

Step 2
Timeframe & budget

Step 3
Development

Step 4
Agreement

START PROJECT

UNIT4

Every separate solution provides you with an opportunity

No doubt, you are now counting up the number of different systems used in your organization…!

As you do that, try to think of each one as an additional order of magnitude by which you may be able to improve performance. Also see every spreadsheet, every paper form as another opportunity to create tremendous improvement:

INTEGRATION CHALLENGES

Each different software system you add creates new integration challenges which can often hamper important communication of information

COUNTLESS UPDATES

Custom software connecting your disparate systems must also be adjusted every time any of your software systems are updated

EXPENSIVE

"Workarounds" only create more headaches, and "middleware" written to achieve the difficult integrations can be very expensive

TIME CONSUMING

Manually copying entered data from one application to another not only wastes time, it also introduces constant opportunities for error

When you automate all your processes with one end-to-end solution, you will significantly reduce costs. On top of that you will enable everyone within your organization to focus on doing what they are good at instead of losing time on working with different solutions that do not communicate.

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The solution

The ultimate solution would be a suite of software from one provider...

It would include time and task tracking, risk & compliance, project & budget management, human resource management, client information and relationship management, invoicing, revenue recognition & WIP, and full financials — all in one comprehensive environment.

You may not have realized that such a suite already exists. If so, you are in very good company!

Many professionals, who have organically collected and arranged a variety of tools that they've needed to run their company (and have lived with the shortcomings), are surprised to discover that there is a comprehensive solution that provides all of the management functionality a professional services organization needs. A complete professional services automation (PSA) solution, called the Unit4 PSA Suite.

PSA

HRM

CRM

Financials

Portals

Mobile

Vertical Package

UNIT4

From funnel to cash

The Unit4 PSA Suite works right alongside your employees through every step of the lifecycle of every individual client.

This lifecycle begins before they even become a client. Because the PSA Suite is built on the foundation of leading Customer Relationship Management (CRM) platform Microsoft Dynamics 365, it brings all the functionality needed to identify potential clients and track your pursuit of them from campaign to campaign and from interaction to interaction.

Once they become your client, you will track and retain every bit of information you collect about them, every contact at their company. You will have comprehensive information about them at your fingertips every time you communicate with them.

The Unit4 PSA Suite augments this base functionality with everything a professional services organization needs to manage their entire relationship with each client. The Unit4 PSA Suite is the one solution you need to track every client and project from funnel to cash!

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WIN

Sales Activity & Proposal

Nothing can actually happen until a client agrees to an engagement. This requires your sales professionals to obtain detailed information about their needs, requirements, and priorities. With these data, they work with your professional staff to develop solutions for the client, which they present in the form of a proposal.

Risk, Compliance & achieving the agreement

In some industries, you need to check your clients to be sure you can do business with them. Check your clients with the integration tools and accept them automatically within one screen of the solution. Agreements are key legal documents which must also be carefully archived and tracked. Once a client authorizes a project by signing an agreement, the work is automatically triggered to begin.

STAFF

HRM / HCM

Skills management, vacation/ sick leave and time entry are all intertwined into the system, allowing more ability to track and utilize resources. Find the right resource for the every job by using match profile for open job vacancies. You can even match the profiles of your resources with those of external candidates'.

Resource Planning

The Resource Planning functionality is wedded to the resource & availability sheet, giving the resource manager the opportunity to search for available resources to utilize for under-staffed projects as every project requires a variety of resources, which must be coordinated between all the employees who will need them during the course of the work.

EXECUTE

Project Management

As the project begins, the plan is informed by all the data that has been gathered about the client, every interaction that has been documented, as well as the entirety of the proposal development process. Project Management within the PSA Suite manages all expenses, all equipment requirements, all tasks and employee scheduling required to deliver each project on time, within budget, and at a level that exceeds expectations.

Tracking Time & Activity

Tracking each professional's time and activity against the project plan enables early warning of any slippage that might introduce delay or excess cost. Tracking is completely dependent upon timely, accurate data entry, which is in turn enabled by increased ease of entry. All users will appreciate how they can instantly enter their time and activity on a timesheet, or even directly into Microsoft Outlook™ & from a Mobile App.

BILL

Invoicing & Collections

PSA Suite automatically feeds all employees utilization data, time and task, equipment used, expenses, and other data about each project for each client into its sophisticated project accounting. This combined with the revenue recognition & WIP module allows your firm to assess and assure accurate accounting of the profitability of every project even before it is completed.

Comprehensive Financials

All stakeholders in the company will be encouraged and confident when comprehensive financial reporting for all projects undertaken are periodically delivered, prepared rapidly and accurately by the PSA Suite, which incorporates General Ledger, Accounts Payable & Receivable, Cash Management and E-Banking.

Project Accounting

PSA Suite automatically feeds all employees utilization data, time and task, equipment used, expenses, and other data about each project for each client into its sophisticated project accounting. This combined with the revenue recognition & WIP module allows your firm to assess and assure accurate accounting of the profitability of every project even before it is completed.

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In business for people.

Contact us

We hope that this e-Guide has helped you to start thinking about your business case for adopting a comprehensive professional services automation solution in your firm.

For further information or for assistance with your business case, please contact: **info.group@unit4.com** or visit **unit4.com/applications/psa-suite**.

About our company

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue of close to 600M Euro and more than 4200 employees worldwide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from sectors including professional services, education, public services, not-for-profit, real estate, wholesale, and financial services benefit from Unit4 solutions.

Unit4 is in business for people.