

# Project Service Automation for IT & Management Consulting Firms

## Project Service Automation (PSA)

Professional services organizations, including IT & Management Consulting firms, are under constant pressure to successfully deliver complex client projects, provide differentiated services, and maximize customer loyalty. Integrating your firm's project sales and delivery efforts can help your organization navigate these challenges by deepening your engagement with your clients, improving project delivery success, and maximizing project profitability.

Microsoft Dynamics 365 Project Service Automation extends the core Dynamics CRM platform to provide a single system of engagement for project sales, delivery, resourcing, and billing. This ensures that your business development team is working with up to date information about your resources, roles, bill rates and capabilities, and that your project delivery team has the information it needs to deliver exactly what was sold.

### Microsoft Dynamics Project Service Automation



*Comprehensive project lifecycle support for internal and external stakeholders*

Designed specifically to serve the needs of both internal stakeholders - practice leads, account managers, project managers, resource managers, and project team members - as well as external stakeholders – your clients – Project Service Automation provides key functionality that enhances the entire project lifecycle.

Available as a cloud based (SaaS) offering, Project Service Automation is easily accessible from any location, and offers a series of cross-platform mobile apps for key features like time and expense management. And because it's tightly integrated with the Microsoft technologies your firm already uses, including Microsoft Office, Microsoft SharePoint, Skype for Business, and Power-BI, you can maximize productivity levels and enable deep collaboration across your cross-functional teams.

## Benefits

- ✓ **Win more business.**  
Maximize business development success with real-time information to help successfully sell your project-based services
- ✓ **Improve project execution.**  
Easily transfer “as sold” work plans, budgets, and billing information from the business development phase directly into project execution
- ✓ **Maximize utilization.**  
Make informed resourcing decisions by finding best-fit resources with the right skills and availability for each client engagement
- ✓ **Improve cash flow.**  
Quickly capture and approve project time and expenses, and review draft invoices online in order to ensure timely and accurate billing
- ✓ **Improve insight.**  
Put critical analytical information about your clients, projects, and resources in the hands of key stakeholders in order to make informed business decisions
- ✓ **Simplify integration.**  
Easily integrate billing and revenue recognition information with your back-office finance and ERP systems through flexible integration options

# Features:

Best-in-class Customer Relationship Management (CRM) capabilities

Put award-winning CRM tools in the hands of your sales and marketing teams to help drive demand for your services and successfully win more business.

Innovative unified services model

Manage all customer service touch points and resources in a single application, including assisted service (call center), self-service, field services, and project-based services.

Powerful business development functionality

Effectively manage opportunities for project sales and build project quotations using up-to-date information about resources, roles, billing rates, and deliverables.

Flexible project planning capabilities

Address a wide variety of project management requirements through the use of flexible work plans and project scheduling capabilities.

Strong project budget controls

Ensure that your projects stay on-budget with real-time budget vs. actual information and the ability to manage budget revisions and change orders.

Powerful resource planning and staffing tools

Maximize resource utilization and ensure optimal project staffing practices using built-in resource planning, scheduling, and competency management tools.

Simple web-based and mobile time and expense entry

Simplify time and expense entry with a modern webbased time and expense system that supports tablets and phones across platforms and form factors (iOS, Android, and Windows).

Configurable services billing engine

Deliver timely and accurate invoices and accelerate cash flow through online invoice reviews, approvals and flexible invoice formatting.

Integrated project collaboration and document management

Improve project team communication and collaboration through integrated Microsoft SharePoint sites for managing project documents and calendars, as well as integration with Yammer for social collaboration and Skype for Business for real-time integrated communications.

Flexible workflow-driven processes

Configure flexible workflow rules for managing key sales process activities and project execution processes (budget approvals, time and expense approvals, invoice approvals, etc.).



Microsoft Partner

Gold Enterprise Resource Planning  
Gold Cloud Platform  
Gold Application Development  
Silver Cloud Customer Relationship Management

Winner

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2017 Partner of the Year  
Enterprise Resource Planning (ERP)  
Award

2017/2018  
INNER CIRCLE  
for Microsoft Dynamics



