An integrated customer experience with Microsoft Dynamics 365 for Project Service Automation

Microsoft Dynamics 365

For organisations involved in project management, earning customers' long-term trust—and ongoing business is the key to successfully growing their business. To do this they must ensure their most valuable resource - their people - are equipped with the right tools.

Service organisations need an end-to-end solution that provides a single system of customer engagement for sales, resourcing, delivery and billing. **Dynamics 365** is a single platform from *Microsoft* that combines ERP and CRM functionality bringing together your business apps (sales, customer service, field service, operations, marketing, project service automation and finance) helping you run your business in a unified and intuitive way, improving employee productivity and driving customer satisfaction.

Microsoft Dynamics 365 for Project Service Automation

Microsoft Dynamics 365 for Project Service Automation is an integrated customer experience for organisations that deliver customer-facing, revenue-focused, project-based services such as planning, estimating and pricing multi-day projects, optimising resource utilisation, tracking and approving project tasks and finances and monitoring performance metrics.

Microsoft Dynamics 365 for Project Service Automation enables project-based businesses to operate more productively and profitably.
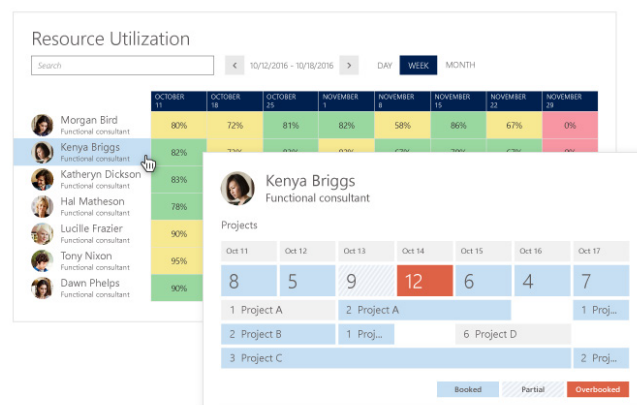
What's top of mind for professional service organisations?

- Acquiring new customers is getting increasingly difficult in a global service economy

- Employee attrition, the cost to business of replacement and training billable resource

- Fostering sales and project service team engagement whilst increasing cross-functional visibility

Solution selling

Give your business development team a single place to access sales force automation services and social insights that make every conversation relevant and productive:

> Shorten and streamline the typical sales cycle

> Become more customer-centric with customer portals. Engage and collaborate real-time with customers on quotes, project scope and resource requirements

> Allow your sales team to focus on the value-add activities as opposed to administration

> Forecast profitability and prioritise deals based on a unified sales management dashboard for both product and project-based opportunities
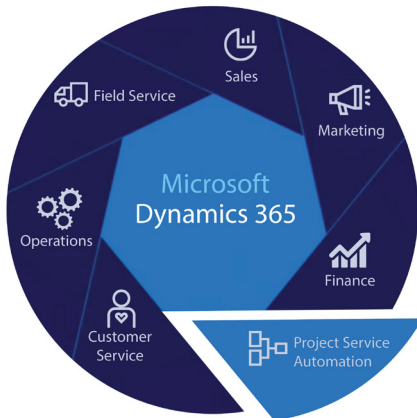
Project Planning

> Make it easy for your sales and project managers to collaborate on estimates using templates

> Improve your project planning from estimation to completion with **Microsoft Project's** scheduling and management strength

> Streamline contracts – Create project contracts, track labour rates and generate statement of works using enhanced and integrated sales force automation

> Visualise cost, effort, and sales value of the work during proposal management for predictable results, credible 'estimate to completion' planning, and financial integrity

> Reduce project schedule and cost overruns with increased visibility in planning tools

Resource Scheduling

> Track both billable and non-billable time

> Optimise resource assignment and scheduling through a consolidated scheduling engine across modes of service and ensure the right people are on the right projects at the right time with "unified scheduling" and "automated and self service scheduling"

> Focus on utilisation – pivot the business on resources to align with skills and talent management

> Support your consultants by empowering them to identify and apply directly for available relevant project roles, and update their skills profile through mobile devices

> Reduce any need to switch between applications in order to achieve holistic views of the project and its resource

Mobile Productivity

Give your team access to powerful and easy-to-use mobile apps for *iOS*, *Android*, and *Windows*. With these apps, team members can select projects, update skills, manage schedules, enter time and expenses, and collaborate using **Office 365** anytime, anywhere for higher productivity.

Time and Expenses

Simplify time and expense management for your employees. Submitting information, assigning it to customers, approving it, and updating the project status are easy with desktop, web, and mobile apps. And configurable process flows ensure these tasks go smoothly at every step:

> Simplify management and tracking of estimated and billed project time by integrating tasks and deliverables on the calendars

> Provide real-time financial insights to customers and empower them to collaborate on timely corrective actions for shared accountability

> Streamline the submission, approval and reconciliation with mobile apps and **Office 365** for timely billing

Customer billing

Give your project managers one location where they can review, override, and approve all job costs. They can generate, approve, and distribute customer invoices in email and on the web.

Business Intelligence

With insights into project profitability, billable utilisation rates, sales cycles and cost over-runs, businesses can minimise risk, spot trends and ultimately grow their operations. **Dynamics 365** with built in **Power BI** easily gives PSO management project-based dashboards to help with new client penetration and employee productivity.

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