

## Driving Performance & Profitability with Dashboards & Analytics

The next generation professional services organization is faced with a wide spectrum of business imperatives and challenges to ensure on-going success and profitability. Flexible technology solutions designed specifically for project-based organizations have aided best-in-class firms in establishing the optimal balance of maximizing customer satisfaction; running a streamlined operation; and constantly increasing the efficiency of services and internal processes.

### Business Imperatives

#### Organic Growth via Profitable, Top Tier Clients

- Know who your top clients are & why they buy. Focus on organic growth to boost revenue & sales through existing profitable client relationships.
- Segment & profile top tier customers & create a top client program to incent & reward loyalty
- Offer preferred service offerings & rate discounts, such as early & on-time payment rebates.

#### Faster, Real-time Decision Support to Drive Down Costs

- Maximize billing & revenue potential by gaining real-time insight to "health" of client account & project trending with flexible drill-down and granular data-driven decision support.
- Identify issues, flag & monitor client accounts gone awry – take corrective actions more quickly & minimize potential losses.

#### Increase Efficiency & Client Satisfaction through Process Automation

- Streamlined & automated processes – from time entry to approvals, invoicing, receivables & end-to-end monitoring, our solution results in greater operational efficiency & improved client satisfaction.
- Ensure solid process controls are in place to ensure completeness & accuracy of time tracking, expense entry and billing.
- Clear, concise details drive shorter cycle time between invoicing issue & payment receipt while providing clients with clearer understanding of value delivered to them.
- Ensure financial reporting & regulatory compliance with automated workflow & process controls that align to requirements while remaining flexible to ongoing changes.

### Solution Highlights

- ✓ We offer Professional Services Dashboards In-A-Box, supported by advisory & implementation services
- ✓ Tailored views for Finance, Operations, Sales, Delivery & Executive Management
- ✓ Accelerated solution envisioning, design & build with our proven reference architecture for Professional Services organizations
- ✓ Rapid deployment via 20+ pre-defined dashboard & report templates
- ✓ Integrated software offering to support project-based organizations

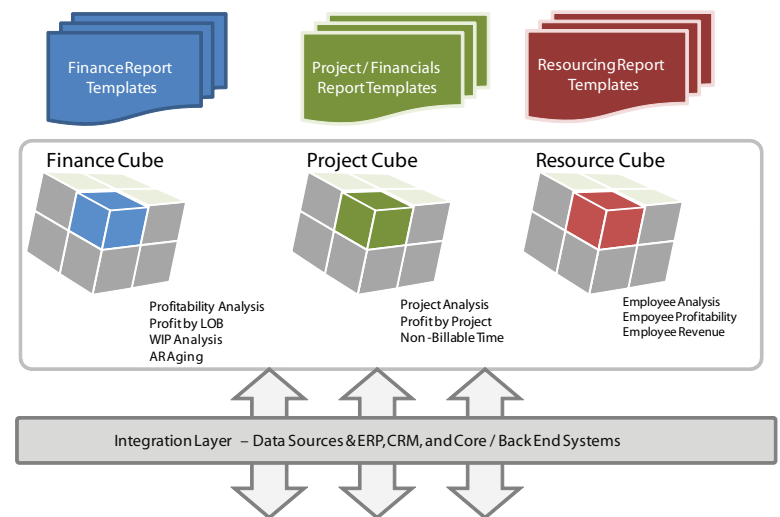
### Dashboards & Analytics to Monitor the Health of Professional Services Organizations

#### Customized role-based dashboards & reports

- Tailored views for Finance, Operations, Sales, Delivery & Executive Management
- Rapid deployment via 20+ pre-defined dashboard & report templates

#### Baseline cubes & report templates include:

- Finance, project, resource reference data models
- Client, project, resource profitability models
- Standardized WIP reports
- Standardized Aging AR reports
- P&L statements with "slice & dice" capability



## What can you expect?

### Achieve Benefits Across Project & Financial Management

Leading professional services organizations continually strive to optimize business efficiency and operations. The adoption of new decision support & analytical tools is effective in helping firms achieve benefits across the key pillars of project management, resource management, operations management & financials.

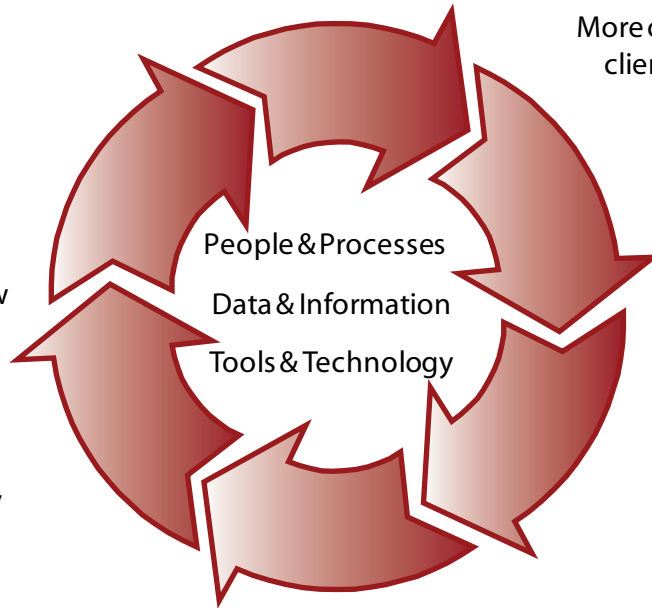
#### Improve sales & marketing effectiveness.

Industrialized sales offerings & client/industry-specific solutions.

Complete client/account history, improving the understanding of how your products create value for them.

Improved understanding of client needs & ability to respond quickly to new opportunities.

360 degree view of clients & prospects  
- By segment, industry, service line offering -



#### Focus on high value potential clients.

More clearly defined & profiled client profiles & project / rate history.

Project & resource management metrics (actual, target) such as:

- Resource Utilization
- Project Profitability
- Client Satisfaction Ratings, etc.

#### Increase operational efficiency & productivity.

Increase client satisfaction –  
Improve on - time invoice payment

#### Increase profitability & growth.

### How Can We Help You?

Our experienced team of consultants coupled with our solution accelerators and an integrated software offering from Microsoft are all critical components to minimize your risk, optimize your performance and reduce your total cost of ownership.

To learn more about Ideaca and our Professional Services Solution Offerings call **1-866-816-IDEA x 5157**, or visit [www.ideaca.com/proserv](http://www.ideaca.com/proserv)



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