

Professional Services Automation

Operational effectiveness through 360 degree visibility of projects, streamlined business processes and tight cost management across the project lifecycle.



Professional Services Automation

Professional Services Automation solutions drive significant operational performance benefits and yield higher revenue and profit for Professional Services Organizations. Unit4 Professional Services Automation, part of the Unit4 Business World On! ERP solution or available as a stand-alone solution, helps you accurately win, execute and bill your projects.

Successful strategy starts with fundamental capabilities

The ever-changing relationships between your projects, people and finances demand attention 24/7/365. To ensure success, your teams must balance tight budgets, resource constraints and scope changes, as well as other project risk factors without being slowed down by disconnected software. With the right software tools in place to support end-to-end project management, you can win more business, successfully deliver on the expectations of your clients and bill with precision.

End-to-end management of the Project

Your teams manage all aspects of the project lifecycle as an end-to-end process; from opportunity, to execution to billing and cash collection. Your PSA software solution should do the same. The result? A better understanding of margin per project, optimal use of peoples time, fewer days sales outstanding (DSO) and more accurate billing.

Win more business

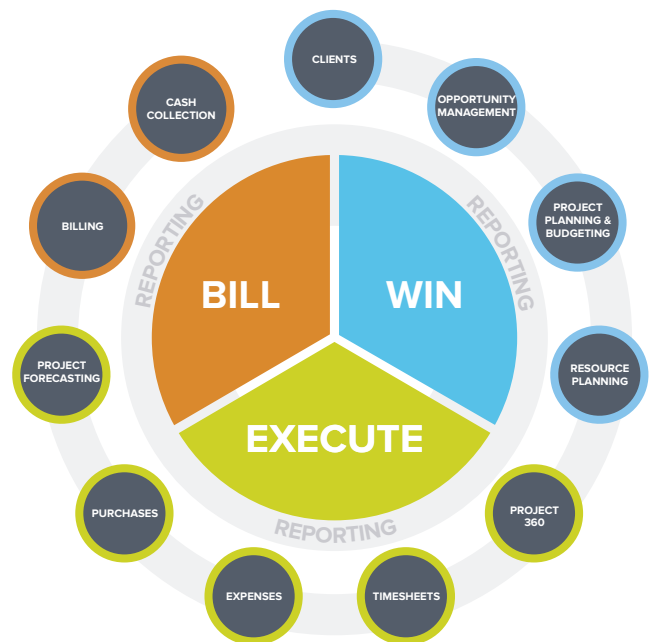
Help your teams involved in capturing, monitoring, managing and decision making around the process to support successful bidding for profitable work. The transition from opportunity to live project is expertly managed and controlled for the project plan, budget and resource plan.

Execute profitable projects:

Enable standardization, automation and tight management of the project, including changes and risks, hour and expense capture, purchasing, forecasting and reporting.

Bill with precision

Support your teams in the essential tasks of billing and collecting cash.



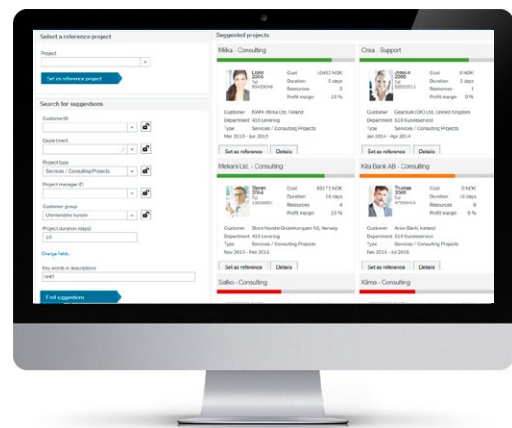
“ We exist in a dynamic and fast changing project-based environment and from the wide range of products we looked at, the Unit4 solution was the only one which could deliver comprehensive project accounting and management information to the standards we require. Unit4’s project focus and their experience of implementing systems in similar environments were major factors in our decision.”

Project Manager at WSP Parsons Brinkerhoff



Reference Projects

With the powerful predictive analytics tools, you can use historic project data as a reference when planning a new project. Within seconds, you understand what the estimate should be and who should work on the project. Then Business World On! does the rest for you; creating the project, a project plan and a resource plan.



[Learn more ¹](#)

WIN Opportunity management

It all starts with the customer. Without efficient management from the outset, the end-to-end project lifecycle will be much more difficult to plan, manage and track. With this in mind, our PSA solution provides all required functionality for managing contacts, opportunities, gateways and potential conflicts of interest. Your pipeline can be recorded and reported on across all stages to ‘Won’. In the unified solution, teams can ensure that the transition from opportunity to live project is managed and controlled as a single record entity.

WIN Project planning and budgeting

[Learn more ¹](#)

Plans and budgets enable accurate bids in the opportunity phase and project tracking in the execution phase. They contribute to accurate forecasts of cash, loads and profit contribution – all of which will provide corporate-wide KPIs, as well as specific project portfolio management level analysis.

Highly flexible and powerful project, budgeting and planning tools are available, which allow for planning of resources over time and against projects, work-orders and activities. Competency management ensures the selection of appropriately skilled professionals for tasks, along with hourly cost information to ensure consistency.

“ In an increasingly competitive consulting marketplace, success most often comes down to operational excellence – with visibility and management controls in place to ensure effective resource and project management. Done right, gross project margins in excess of 60% are possible. Done wrong, project yields can drop to single digits, or go negative.”

Source: *Service Performance Insight, February 2016*

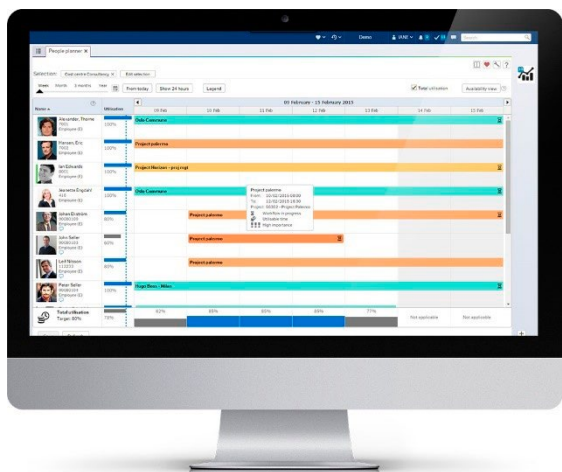
¹ www.unit4.com/erp-latest

WIN Resource planning [Learn more](#)¹

Resource planning information is readily available to identify which resource categories can be used most effectively, and to monitor and manage availability and utilization at any level of the organization - and by any analysis category.

Your teams can understand staff availability within a division by discipline - but it may also be valuable to understand the availability of a discipline, such as engineering consultant, across all divisions.

Agile analysis and reporting capabilities provide your teams with this information.



EXECUTE Timesheets [Learn more](#)¹

In a Professional Services Organization more than 80% of direct project costs are people costs. As a result, it is imperative that timesheets are captured quickly and accurately for speed of billing and cost analysis.

For end-users, they will only be shown the projects that they're assigned to. Entries can be populated from the previous week or from People Planner. Flexibility in configuration allows for different people with different working hours or work patterns to use the same system to enter timesheets.

Timesheets can be entered in days, weeks or monthly periods; and the timesheet screen is configured specifically to the users' needs to create the best possible user experience. Timesheets and expense sheets can also be captured as they happen via the Unit4Me app; this keeps all consultants up to date on the latest news regarding their projects.

For costing time, from standard costing based on staff categories, through to fully integrated payroll-based, formulaic cost rates, you get a highly flexible solution.

EXECUTE Expenses [Learn more](#)¹

You can effectively manage the expense process from start to finish. Recoverable project-related expenses are entered via the Unit4Me app on any device in the same way as non-project-related expenses.

Using the workflow, you can manage the recoverability process through project invoice rules – appropriate authorization of expenses are based on your own rules!

EXECUTE Purchases [Learn more](#)¹

Procurement of project-based and overhead purchases often creates a high level of administration. To reduce this and its costs, the PSA solution provides significant efficiencies at all stages of the process. Requisitions and project commitments can automatically be included in all report monitoring in combination with budgets, forecasts, time costs and other costs to date. This in turn means your organization can enjoy improvements in project cost monitoring against budget, where sub-consultancy staff are used.

Attachments enable Project Managers to raise orders and issue to suppliers any associated documentation with the order, such as proposals or correspondence.

EXECUTE Project 360

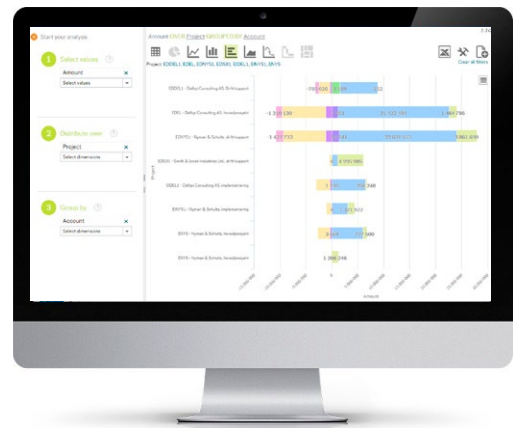
At the centre of the Unit4 Professional Services Automation solution is the project. Project Managers have 360 degree visibility and control over all project-related information from within one, single workspace. You get a consistent look and feel in all aspect of project work, and total integration of all project, finance and people processes because the solution has grown from the same source – Unit4 Business World On!. This consumer grade user experience is particularly valid when timesheets, expense sheets and requisitions are used, because the Project Manager can control who can post hours expenses and raise purchase orders within projects.

Follow-up, authorization and control procedures will be in place to capture hours and costs that may not be recoverable, or which are incorrect. The result is improved project margins, fewer write-offs, additional revenue and benefits to the cashflow.

EXECUTE Reporting and analysis [Learn more](#)¹

Reporting and analysis are key throughout the project, keeping people up to date with accurate and reliable data.

Unit4 reporting tools satisfy the requirements of strategic, managerial and operational reports. End-users can produce reports and interrogate the system to get the information they require, whether it is financial, statistical or analytical data – and whether output is required as a graphic, a document or simply to screen. The reporting suite complements the standard reports and enquiries providing end-users with the data they need from a single project or aggregated, multiple projects. The result is that you gain the agility to quickly and inexpensively analyze and report on an unlimited number of business scenarios and parameters.



This agility and power of reporting and analytics capabilities, unmatched by the market's traditional ERP leaders, stems from Unit4's unique architecture, which smartly integrates the information model, the business process model together with the delivery model.

“ PSA solutions help match the right resources, with the right skills at the right time. PSA solutions yield a number of core benefits to PSOs, but most executives only need to look to the 4% increase in billable utilization, as the reason to select PSA.”

Source: *Service Performance Insight, February 2016*

“ Visibility and accuracy of project information have enabled us to forecast more effectively and to react to changes both internally and externally swiftly and efficiently. “

Tony Fidler, System Manager at RES

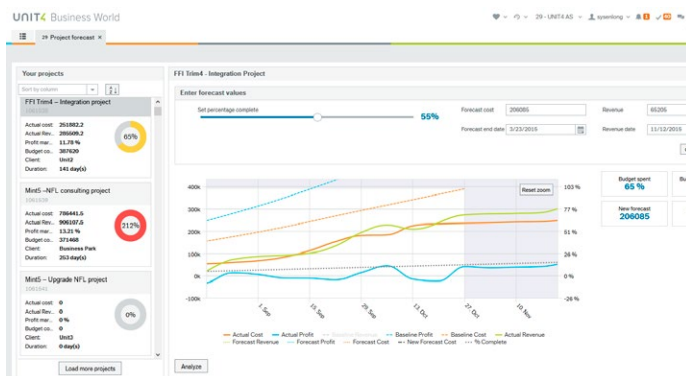
Finally, procurement is fully supported by sophisticated, integrated workflow to enable you to apply your own authorization rules to the purchasing process.

EXECUTE Forecasting

As the project moves forward, periodic reviews – including estimate time and cost to complete – takes place to ensure the project is on track. This also feeds into the work in progress (WIP) and revenue recognition process.

Projects require ongoing monitoring and forecasting, as well as initial planning, to account for scope changes and variances to the original plan in terms of actual work completed and the current view of work yet to be done to complete the project.

You can manage this requirement with auto-forecasting analytics, 'actuals based' forecasting, cost to complete functionality and unlimited budget and forecast versions. This saves time and gets the critical information straight into the system.



EXECUTE Revenue recognition and WIP

Our customers all adopt variations of similar practices to identify WIP and revenue recognition as per their preference. The Business World On! tools provide a flexible approach to WIP and revenue recognition by providing this flexibility within the standard Unit4 framework.

BILL Billing and cash collection

One of the biggest areas of improvement that can be gained from the implementation of an end-to-end PSA solution is the replacement of the volume and complexity of spreadsheets. Spreadsheets exist for many purposes, including reporting and analysis, but most often they support the billing process. Often each Project Manager will have a different spreadsheet system of their own - certainly not the best way to manage the most significant component driving your cashflow!

You get a comprehensive solution to billing, including possibilities on sales rates per employee, per function, role, client, project or a combination, which allows for the customer contract agreement to be efficiently managed. This then generates draft invoice proposals for workflow approval on a timely basis for project managers to edit and approve.

Timesheets, expenses, milestones, fixed fees are all processed as per the contract with no human intervention required - other than updates to the contract or detailed editing of the invoice content as necessary.

“Larger PSOs rely more heavily on their core ERP solutions to manage any external transactions which means PSA integration is imperative as billing, collection, expense management and payroll are all managed in the ERP solution.”

Source: *Service Performance Insight, February 2016*

Collaboration throughout the project lifecycle

A vital part of modern business is the ease of collaboration. To facilitate collaboration and support project stakeholders, you can set up a project community with Slack.com integration. In Communities, project team members can share news, documents, pictures, views and opinions, and see the other team members and project performance. This enables everyone to keep in touch in a social and engaging way. Teams can use chat functions to communicate with each other and keep these conversations pinned to the project record for future reference.



Multi-national challenges

Today, companies follow their customers into new geographies and new markets, and provide professional services on a global scale. The means utilization of resources from all over the world on international projects. Therefore, the end-to-end PSA solution must be multi-lingual, multi-currency and multi-company, and support multiple charts of accounts to meet local statutory reporting requirements.

Using one, integrated PSA, project accounting and Human Capital Management solution to support the end-to-end project lifecycle brings all international performance under one umbrella.

It provides data for consolidation and KPI trend analysis on demand, and allows your disparate, global entities to operate as one, single organization.

Complete alignment between projects and financials

All financial activities and transactions throughout the project are available in real-time for your Finance department. Integration is absolute and complete to the extent that transactions from any area can post to a project.

“Because we are likely to add to the system later we felt a single integrated approach was a better option for us than a number of separate ‘best of breed’ packages. In addition Unit4’s experience with other Professional Services Organizations will be very useful for us and it combined the right functionality with value for money.”

Finance Director, *Steer Davies Gleave*

The People Platform – delivering real business value in practice

In the Professional Services industry, it is very time-consuming for management and project teams to achieve resource utilization, billing, project forecasting, time-sheet reporting, travel expenses, and more. The Unit4 People Platform reduces these low-value tasks to a minimum. The result is readily-available information that eliminates latency and ensures better decision-making.

Here are a few scenarios where the People Platform increases productivity and delivers value:

1. The Consultant

Consultants who regularly travel for business carry their cell phones at all times. Using smart Travel and Expense applications, they can automatically track their daily activities and client visits, fill out expense reports and time sheets, and cross-check them against their calendars and past expense patterns. This eliminates hours of manual drudgery on non-client-related tasks, and enables the consultant to focus on more important activities.

- Connects all this empirical data with its predictive analysis and social collaboration input, so managers get a more balanced view of project status, utilization and profitability than ever before.
- Provides a better view of the overall effort, the details when necessary, and the exceptions that need attention. This enables you to continually make improvements that affect your people, your clients and your top and bottom lines.

2. The Business Manager

Leaders of project-driven organizations must always know the status of their team and their projects. They need the right data at the right time in order to make effective decisions. It is unacceptable that critical information is only available several days after a month closes.

The People Platform:

- Provides total and immediate access to time, expense and status reports with its easy-to-use mobile solutions. It combines this data with important personal input from team members through its unique social collaboration tools. Business Managers stay informed when it's most important – in real time.

3. The Project Manager

Predictive analytics offer great advantages to Project Managers when creating new project estimates. When a company runs regular projects, data such as budgets, forecasts, re-forecasts, timesheets, expenses, invoices and other actual costs is captured.

Unit4 applications can predict the time and cost of the next project, based on former projects. It is all about leveraging the data, defining patterns, clustering similar types of projects and using machines for what they do best – processing vast amounts of data. We are entering the next phase of innovation for the services industries where applications are driving the creation of optimal project plans, including defining the optimal project teams.

Why Unit4?

People are at the heart of Professional Services Organizations. Unit4's solution has been built from the ground up to reflect the business realities of project-intensive and consulting-centric organizations without limitations.

The Unit4 people-driven approach is evident...

- ...in our flexible, adaptable applications that grow and evolve with your people and your business.
- ...in our social and mobile capabilities that keep your people connected wherever they are.
- ...in our embedded analytics and industry-specific capabilities available right out of the box.
- ...in the Cloud at your Speed approach that delivers cloud deployment at the speed you require.
- ...in the Smart Context capabilities that learn from every interaction in your system.

Above all, our approach to helping project-intensive and consulting-centric organizations succeed is in our core philosophy – we make the applications, you make the rules.

Contact us

For further information regarding Professional Services Automation please contact your local support office at: email: info@unit4.com or visit: www.unit4.com/professional-services

About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue north of 500M Euro and more than 4200 employees world-wide, 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.

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