

Unit4 PSA for Consulting firms



Driving operational excellence in consultancy firms

Manage your relationships and service delivery from the first client contact through to invoice and cash collection, with Professional Services Automation (PSA) and Finance built on the powerful Microsoft Dynamics 365 CRM platform.

Client satisfaction is the lifeblood of any consultancy practice. So your top priority as a consultant is to provide value to your clients by consistently delivering the best service and advice. You are focused on the productivity of your consultants, and where you can benefit from automating your organization's processes.

The modern professional requires the best tools to manage their everyday business. With Unit4 PSA you can: track communication, and book time and expenses on the go, so that budgets can be properly managed and billable time doesn't leak away; create new opportunities simply and convert them into projects;

combine these with flexible forecasting, so you have visibility of business performance – all in one single cloud solution.

Unit4 PSA delivers

- Pre-defined project templates and built-in legislation support
- Built-in industry best practices
- A significant increase in efficiency/performance and a reduction in admin time
- Synergy – end to end collaboration from funnel to cash, in one single solution

Product capabilities for consultancy

As a stand-alone solution, Unit4 PSA delivers great value for your consulting firm out-of-the-box. The built-in best practices are based on our extensive experience with firms like yours. You get the right tools to maximize your employees' productivity and a 360-degree view on your clients. It can help you achieve operational excellence - essential to help you accelerate your business and stay ahead of the competition.

Win more business

- Track client communication, manage your pipeline and engage with your clients
- Manage opportunities; forecast sales and revenue
- Coordinate your efforts with embedded marketing automation tools
- Utilize pre-built integrations with O365, SharePoint, LinkedIn, Company Info and D&B

Make optimal use of resources

- Match people and engagements with a built-in matching engine
- Access the skills engine directly from the resource schedule
- Sync scheduled work directly from Outlook Calendar into your timesheet
- Get a visualization of the firm's resource utilization
- Use the employee portal with HR integration

Execute profitable projects

- Use the built-in Risk & Compliance checks
- Measure actuals against budgets and monitor project forecasts
- Create projects and budgets with pre-defined templates
- Plan project schedules with Gantt Charts
- Check project health with built-in performance reports
- Record time, expenses, fees, allowances directly on the project, via web & app

Bill with precision

- Recognize Revenue and Work-In-Progress (WIP)
- Consolidate billing from different projects
- Get single invoice billing and batch invoicing
- Select from 9 contract types for billing
- Use E-invoicing

Adding extra value

Combine the best of PSA and ERP

Unit4 PSA can be integrated with any 3rd-party ERP to complete your true enterprise business platform.

Leverage your Microsoft investment

- Built on Microsoft Dynamics 365 CRM
- Standard integrations with Office 365 apps
- Cloud hosting by Microsoft



To learn more about how Unit4 PSA powers consulting practices like yours, contact us at psasales@unit4.com