

A woman in a light-colored blazer and dark skirt is walking from left to right in a bright, modern office. The office has large windows with a view of trees, and there are two white lounge chairs with metal frames. The floor is a light color. The overall atmosphere is professional and bright.

UNLOCK YOUR BUSINESS **potential**

PROFESSIONAL SERVICES

Microsoft
*Business
Solutions*

Efficiency and execution are paramount. In professional service organizations, efficiency is a primary concern. Businesses are challenged with selling an intangible product which is ever-changing and difficult to quantify. Profitability requires that projects are estimated correctly, are completed on time and meet customer requirements.

In many cases, specialists may be subcontracted—adding complexity to project management. To succeed, professional service companies must adopt strategic and comprehensive financial, project, and resource management practices.

Expanding the use of information technology is the best way to add greater value while supporting more cost-effective operations. An affordable computing infrastructure makes it easy to share data for effective decision-making. Equally important, deploying advanced technologies allows a professional services organization to work as one integrated team, including both internal operations and outside business partners and customers. All this is particularly true for small- to medium-size professional service firms, seeking to grow and thrive in an increasingly competitive environment.

The Customer Front and Center

Creating strong client relationships that provide repeat business is a critical success factor in today's highly competitive professional services environment. Each project provides the opportunity to add to a knowledge base that can be leveraged for future projects. This client- or industry-specific knowledge is a valuable asset—it provides the opportunity to improve profitability and customer service and provides an edge in a competitive market.

Once the customer is engaged, ongoing collaboration can be facilitated by a flexible IT infrastructure that provides customer interaction with advanced electronic document and transaction exchange capabilities. Shared project document repositories greatly improve the quality and efficiency of developing and organizing project-related teams, meetings, and document deliverables. Document version controls are especially useful for an approval workflow, offering check-in and check-out, document profiling, and publishing. Web-based access and robust security assure that both the client and the firm can interact safely while protecting critical client and firm information.

Smooth Project Management

Accurate but flexible project management—from the initial proposal through invoicing—is absolutely essential to the success of every project.

Creating a proposal that accurately reflects the demands of the project is the first challenge. Software applications can provide detailed, multidimensional project histories, helping project managers deliver better initial project estimates on tight deadlines without resorting to guessing. CRM software also allows firms to maintain a rich repository of historical project information that can be reused in future quotes.

GAIN THE COMPETITIVE **edge**

Robust software applications offer sophisticated functionality to take client relationships and turn them into a profitable business. Many professional services organizations depend on customer relationship management (CRM) software to build a first-class service organization by managing and tracking all customer-facing activities. Starting at the initial contact stage, these software products can assist in managing leads through a guided sales process with defined rules, automation of routing, notifications, approvals, and escalations.

The management consulting firm Pittiglio Rabin Todd & McGrath, for instance, has created an integrated library management system that all their professionals can use to leverage best practices and information across the firm.

A professional services organization needs to structure projects for accurate and effective utilization of internal resources and be able to provide a platform for cost information and reporting. Information technology supports critical path scheduling that helps assure that the highest priority work gets done first.



Customer Success
Forgent Networks

Forgent Networks is a leading provider of enterprise meeting-automation software and services that enable organizations to streamline and automate their meeting environment. When Forgent refocused their business on core processes, their existing system proved too large, complex, and costly to maintain. Instead, they implemented Microsoft Business Solutions to simplify their operations. Not only was Forgent able to streamline their processes, but they also saved 85 to 90 percent in maintenance, depreciation, and support costs compared to their legacy solution.

"Several of the legacy functions never got us anywhere near where we needed to be. Microsoft Business Solutions is years ahead, right out of the box."

Mike Rondini :: Senior Director of Financial Operations, Forgent Network



Customer Success
Pittiglio Rabin Todd &
McGrath (PRTM)

PRTM is an internationally recognized management consulting firm with 14 offices in North America, Europe, and Asia. The company implemented Microsoft Business Solutions to eliminate several independent “silos” of information. Microsoft solutions have helped them reduce their invoicing cycle by 66 percent and also save 80 percent on their library management budget by developing an integrated library management system within the Microsoft solutions.

“Microsoft Business Solutions has enabled us to significantly improve our financial processing time and efficiency. We get more done faster and more accurately than before, all with less effort. The labor savings alone have paid for the cost of the software.”

Chris Parks :: Vice President of Finance and Information—Pacific Region, Pittiglio Rabin Todd & McGrath

Early in the project plan, the project manager can configure workflow-driven approval processes, critical path schedules, and exception-driven alerts so key decision-makers can see and respond to issues quickly and not lose them among less important details.

More Efficient Operation

The business life cycle is complex and ever-changing. As a service offering matures, the nature of the service-delivery work changes. The mix of professionals appropriate for completing the work will change, the rate structure and salary structure will fluctuate, and the leverage model—the ratio of junior personnel to senior personnel—will also need to adjust to preserve profitability.

Financial tools to enhance the visibility and control of a professional services organization are available, resulting in confident and smart decisions. From Web-based time and expense entry systems to automated billing and customized invoicing, business tools can help make operations healthy and profitable.

These tools enable practice leaders within the organization to monitor day-to-day and month-to-month metrics across all personnel and projects. Armed with this information, management can make incremental improvements across the business. Firms can encourage greater productivity by setting goals for billable time, utilization percentages, and revenues. Software can help management track against those goals and reward employees through automated incentives systems. Then, when particular service offerings mature, management can quickly modify rate and salary structures to reflect the reality of the market.

A flexible IT infrastructure is especially helpful when managing partners and subcontractors. In today's environment, clients often demand deeply knowledgeable specialists, which often require assembling outside experts to win the business. Software solutions can help track agreements, documents, and change

professional services organizations. Our integrated tools give professional service organizations the critical capabilities they need to manage every aspect of services, from customer relationships and projects to business process outsourcing and financials.

Our technology platform allows small- and medium-size professional service organizations to assemble a complete, integrated set of leading-edge business applications. These integrated applications can be deployed quickly and inexpensively without complicated customizations and drawn-out implementation projects. Working with our partners, we have added the deep vertical functionality needed for the wide range of professional services organizations.

Our solutions are based on advanced, secure Internet technology that extends and enhances traditional ERP and provides a powerful development environment. Moreover, Microsoft Business Solutions provides a solid growth path for years to come, with our ongoing commitment to enhanced solutions along with the continued integration of Microsoft software to deliver even more value than it does today.

In short, Microsoft Business Solutions can help professional service firms streamline operations while increasing value, improve interactions with customers, and make faster, smarter decisions.

Build a World-Class Operation

Microsoft knows that deep industry expertise is required to address the range of professional services needs. That is why we work closely with more than 6,000 partner companies from around the world to bring firms outstanding software applications combined with the world-class capabilities needed to meet specific business needs. To ensure a seamless computing environment, all our solutions and our partners' offerings integrate fully with Microsoft Office and financial tools to meet the diverse needs of the professional services industry.

THE PERFECT **delivery**

orders with these partnerships. Automated payment capabilities will assist in protecting cash flow, tracking outstanding liabilities, and making payments contingent on deliverables to handle payment retention and pay-when-paid scenarios.

Optimal Performance with Microsoft Business Solutions

Microsoft® Business Solutions offers a set of strong applications that deliver a compelling suite of technologies for midrange

Stay Ahead of the Competition

Affordable and easy to use, Microsoft Business Solutions gives professional services organizations control across the entire project life cycle—generating proposals, managing resources, scheduling deliverables, creating reports, and, finally, invoicing. With our tightly integrated tools, firms can track and manage all their resources to improve utilization and allocation of their valuable professionals' time.



STAYING ahead

We offer an outstanding portfolio of enterprise-wide solutions combined with first-rate financial resources and the technical expertise to improve those systems over time. Plus, we offer an outstanding and cost-effective implementation channel to deliver solutions for the mid-market professional services firm.

To learn more about how affordable, integrated Microsoft Business Solutions can help professional services organizations keep ahead, visit:

www.microsoft.com/psa



PROFESSIONAL SERVICES

www.microsoft.com/BusinessSolutions

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