



Public Affairs Leader Gains Instant Insight into Projects, Revenue with Cloud Software

To apply data-driven insights to its own business, GSG deployed Microsoft Dynamics 365 for Project Service Automation. With it, GSG gains a real-time understanding of its project-based business and staffing needs, and frees up valuable funds for additional technology projects.

At the outset of the 2017 American football season, several players chose to take a knee (versus stand with hand on heart) during the singing of the national anthem. A national uproar ensued.

Sports television channel ESPN hired Global Strategy Group (GSG) to conduct a survey to determine public feeling on both sides of the highly charged issue and featured the results on ESPN Sports Center.

Fortune 100 companies, political leaders, associations, and nonprofits depend on GSG—headquartered in New York City with five additional offices nationally—to help them change minds, influence public opinion, build and protect reputations, navigate crises, manage legislative and regulatory landscapes, and win campaigns. GSG helped New York City Mayor Bill de Blasio and Chicago Mayor Rahm Emmanuel get elected and institutions as diverse as the University of Pennsylvania, Major League Soccer, and Google devise communications strategies and mitigate bad press.

Client Overview



INDUSTRY: Professional Services

LOCATION: USA

SYSTEMS: Dynamics 365 for Project Service Automation; Dynamics 365 for Sales; FastTrack for Dynamics 365; Power BI

Global Strategy Group (GSG) is a highly regarded research and public affairs firm that US companies, politicians, and institutions rely on to help them understand public opinion and communicate more effectively.



How are we doing?

Despite its successful track record with clients, the data assessment expert needed help figuring out how its own business was doing. Explains Andrew Ho, Chief Information Officer at Global Strategy Group, *"We don't have dedicated salespeople; our senior VPs sell and deliver work, so their revenue targets include both forecast sales and work in progress. Management couldn't easily disentangle these two revenue streams and get a point-in-time sense of how the business was doing. We especially struggled with year-end budgeting and forecasting, trying to determine how much business we could take on in the coming year."*

Since 2008, GSG had used Salesforce to manage sales deals, but Salesforce had no out-of-the-box project service automation capabilities, such as billing and time and expense tracking. Employees copied and pasted Salesforce data into spreadsheets and otherwise cobbled together reports. *"Our project-based tools were held together with baling wire and bubble gum,"* laughs Ho.

When Salesforce announced yet another price increase, Ho said no more. *"What we were paying for Salesforce outstripped its benefits,"* he says.

Everything needed out-of-box

Being the data nerds that they are, Ho and team performed an exhaustive evaluation of no fewer than 13 sales management, customer relationship management, and enterprise resource planning solutions. They chose Microsoft Dynamics 365.

"We were looking for a system that included both sales and project management functionality and had a much lower price than Salesforce. Dynamics 365 hit that sweet spot," Ho says. GSG initially licensed Dynamics 365 for Sales and Dynamics 365 for Project Service Automation, with the intent to roll out other Dynamics 365 applications in the future.

Dynamics 365 for Project Service Automation is a holistic solution that billable project-based organizations use to manage all aspects of client-facing activities, from sales through project staffing, project delivery, and invoicing.

GSG engaged Microsoft Partner Velosio to handle implementation and train employees. Velosio also connected GSG to the Microsoft FastTrack for Dynamics 365 program, which provides implementation best practice and assistance. *"Through FastTrack, we had a dedicated Microsoft person to provide technical assistance,"* Ho says. *"He was incredibly helpful."*

Better visibility, smarter actions

With Dynamics 365, GSG has much better insight into the state of its business. When GSG pitches a project, there are many components—surveys, focus groups, media relations, digital platform building, analytics—and in the basic Salesforce product, each of these activities was a separate project, making it difficult for GSG to relate them, know who was doing what for a client, and determine which activities had been successful.

GSG can see all that and more in Dynamics 365. *"With Project Service Automation, we can group*



like projects so that we can report far more easily on work we're doing for a particular client," Ho says. "When a client elects not to buy certain services, we can record the loss reason for each individual service. We can see whether we should even bother pitching certain services if no one ever buys them."

GSG can see what it costs to win deals, how much effort (in hours) it takes to create certain kinds of activities such as surveys, and, best of all, disentangle its sales pipeline from its project work pipeline. Employees can see all this at a glance on Dynamics dashboards.

"With Dynamics 365 for Project Service Automation, we'll be able to revolutionize how we forecast and plan our business," Ho says. "We'll have the data to see how we did last year and how to plan for next year."

Better staff utilization

GSG also has much better insight into staff utilization. Its 85 employees work in six offices, and employees usually work on multiple projects at once. *"With Project Service Automation, we can see who's available, who's oversubscribed, and who has expertise or interest in certain topics, such as environmental regulations or gun control," Ho says. Previously, figuring all this out was done by word of mouth and emails—or, Ho says, by sticking your head above the cubicle maze and seeing who was at their desks.*

"By understanding if we are fully utilizing our current staff, we can better determine if we need to hire more people," Ho says.

Licensing savings yields more funds for innovation

GSG watched its licensing costs drop a whopping 34 percent when it switched from Salesforce to Dynamics 365. The company is reinvesting this savings in new technology projects, such as deploying Microsoft Power BI and additional Dynamics applications, and further customizing its existing Dynamics applications.

"Until recently, GSG considered IT a back-office function rather than a strategic directive," Ho says. "But management now believes that technology is critical to the business and a big competitive differentiator, and we've embarked on multiple digital transformations. There is an endless list of technology projects that we want to pursue, so every penny counts. We are getting far more for our money with Dynamics 365."

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