



CLIENT SOLUTION CASE STUDY

# Management Consulting Firm Nails Project Management with End-to-end Microsoft Solution



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

## Background

When a management consulting firm first approached Velosio, manually driven processes hindered their ability to maintain the highest level of client care and professionalism. With an aging Microsoft Dynamics SL back-end ERP and NetSuite for CRM, the team resorted to sticky notes and Excel spreadsheets. There was little to no visibility into its consulting bench after a deal closed, and billing and timesheet management was challenging, to say the least.

The team started to see an introduction of manual processes, work arounds, and Excel spreadsheets, and felt as if they were not maximizing the power of their ERP system. Eventually the manual processes generated billing issues, which in turn created accounts receivable and collections issues.

## Partner Pipeline Challenges

The firm had little visibility into the partner sales pipeline, so when consulting partners input deals with statements of work, and it was sent to resourcing, they would have to scramble to staff the deal with limited information into resource availability. Timesheet tracking was a lengthy, monthly process. If a project overran its budget, the team didn't realize it until the next monthly timesheet and billing cycle.

### OVERVIEW

#### Software Solutions:

- BC
- Progressus
- Sales
- Marketing
- Power BI
- M365

#### Challenges:

- Manual processes
- Disconnected systems
- Reporting and insight constraints

#### Benefits:

- Visibility into project lifecycles
- Enhanced resource management
- Better billing and financial controls
- Capitalize on cloud technology with integrated solutions

#### Company Overview:

Leading management consulting firm with services ranging from strategic planning through implementation across many industries, business units, and functions.

**Industry:** Professional Services

**Employees:** 200+



The consulting firm also needed a way to manage marketing and track leads, events and touch points for prospects and customers. The firm decided to upgrade its system to break the cycle of inefficient workarounds.

## End-to-end Microsoft Dynamics Solution

The organization selected Microsoft Dynamics 365 Business Central with Customer Engagement, Marketing, and Progressus, for an end-to-end modernization project with Microsoft partner Velosio.

During the implementation, the firm tried to treat the solution as not just another tool but instead, an opportunity to transform the way in which they operated. They put together a continuous improvement and change management team in tandem with the implementation which keeps the training fresh, keeps features and functions present, and ensures user adoption and an evolution of the system.

Data and Reporting was a big consideration during the project and after go-live. Velosio engaged its Data Platform Services team to help complement Business Central and Customer Engagement, with Power BI to provide clear visibility, in real-time, for its executive team to aid in decision making.

## Customer Engagement and Marketing

With Microsoft Dynamics 365 Customer Engagement, the consulting firm has insight into lead stage, and what opportunities will soon close, so they can determine what resources they need to fulfill the projects. Once the deal is closed, it's sent over to Microsoft Dynamics 365 Business Central for billing information and scheduling. Now, schedulers can match skillsets from its consulting bench with appropriate projects.

On the marketing side, they can now funnel leads from their website into Dynamics Marketing to put them on a customer journey with targeted emails and campaigns. Webinar events are fully managed online with Microsoft Teams integration to Microsoft 365.

## Progressus Advanced Project Management

Timesheet management is now a structured, weekly process. The management team can easily pull reports at the push of a button to determine where timesheets are stuck in the process, as well as to look at resource utilization. Specialized dashboards for the firm's partners help them to better manage their project portfolio. Each partner can now login and view information for their assigned projects.

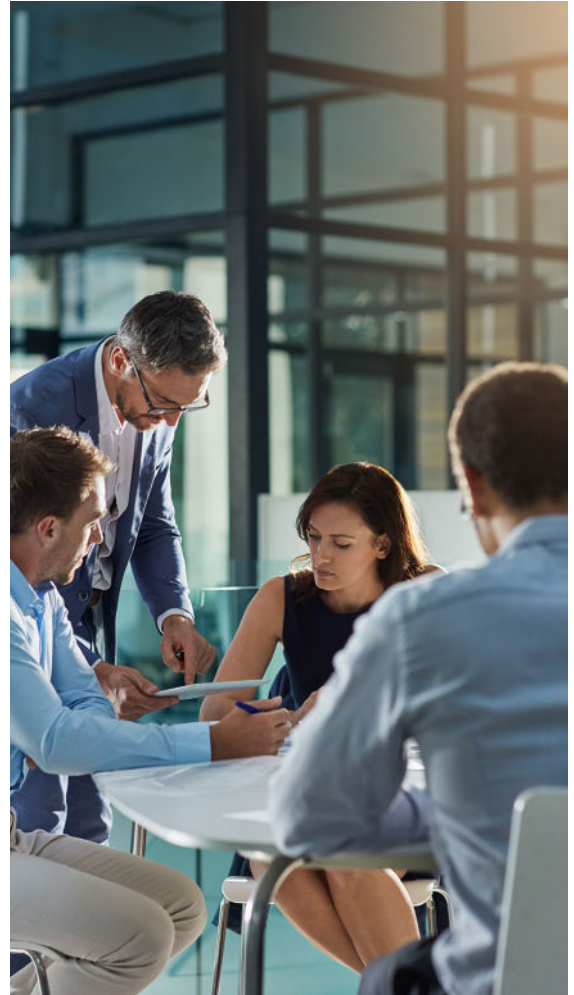


Progressus Advanced Projects for Dynamics 365 Business Central provides everything the firm needs from a project management perspective — flexible project forecasting, powerful project planning, estimating, and budgeting. Easy mobile time and expense entry. Project-focused analytics and insights. With Progressus, the firm can now maximize utilization, complete great projects on-time and on-budget and optimize its project portfolio.

## System Benefits

The new, improved Microsoft solution allows for:

- Forecasting and visibility into project profitability
- Weekly timesheets instead of monthly
- Analytical dashboards for staying on top of project management
- Converting pipeline to forecast
- Marketing campaign management with customer journeys
- Increased visibility for real-time decision making
- Workflow approvals and resource management
- Increased cash flow and profitability
- Better project management and limiting overruns



Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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