

Unit4 PSA Suite in Consultancy



Driving operational excellence in consultancy firms

Manage your client relationships and service delivery: from the first client contact through to invoice and cash collection, with a Project Service Automation (PSA) and Finance system 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. As a firm, 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 the Unit4 PSA Suite, 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, and get all of this in one single solution in the cloud.

PSA Suite 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, from funnel to cash, in one single solution

Product capabilities for consultancy

As a stand-alone solution, the Unit4 PSA Suite delivers great value for your consulting firm out-of-the-box. The built-in best practices are based on our extensive experience with firms similar to 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 in a world where it is all about accelerating your business and staying ahead of the field.

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 integrations with O365, SharePoint, LinkedIn, Company Info and D&B

Make optimal use of resources

- Match people and engagements via a built-in matching engine
- Access the skills engine directly from the resource schedule
- Retrieve scheduled work directly from Outlook agenda 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 through 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)
- Consolidated 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

The stand-alone Unit4 PSA Suite can also be integrated with any other 3rd-party ERP to form a true enterprise business application.

Leverage your Microsoft investment

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

