

# Project management solutions for every business

Five use cases





---

Most professional services and manufacturing companies require a project management solution. The right software depends on several factors, including company size, most pressing challenges and existing IT landscape. Read about five different companies, their pain points and which solution helped them achieve their desired results.

# Content

---

1. Professional services SME – proRM Fast Start.....	4
2. Manufacturing enterprise – Microsoft Dynamics 365 Project Service Automation .....	6
3. Professional services start-up – proRM Fast Start.....	8
4. Manufacturing enterprise – Microsoft Dynamics 365 Project Service Automation + add-ons.....	10
5. Manufacturing SME – Dynamics 365 Sales & proRM Fast Start.....	12

# Professional services SME – proRM Fast Start

## About the company:

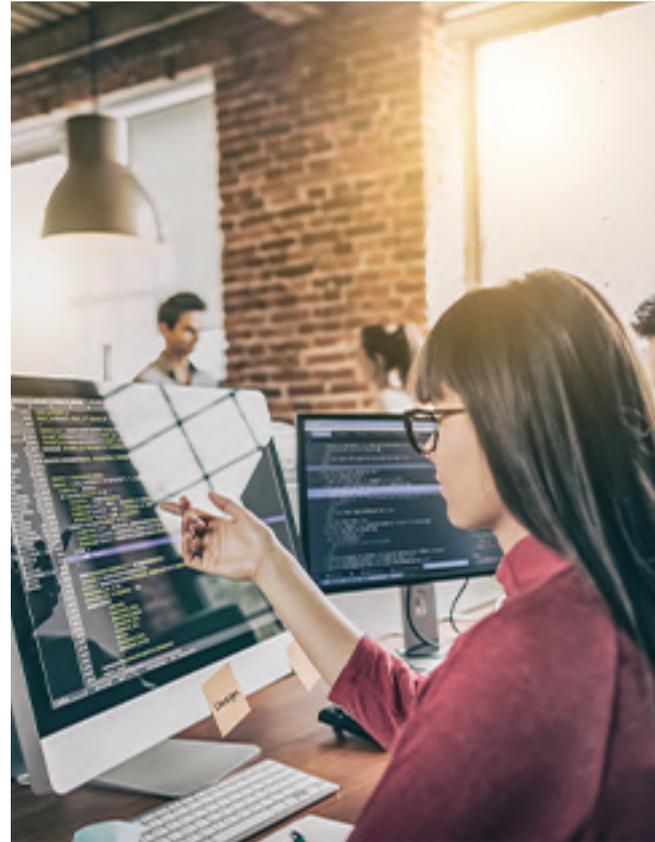
The mid-sized IT consultancy offers digital transformation consulting and implementation services to non-profit organizations. It advises its customers regarding strategy, supports them in process optimization by deploying technologies that meet their business requirements.

## Challenge:

The business was relying on several different Microsoft Office tools to manage its projects, track time and create invoices. These media disruptions caused both inefficiency and mistakes. Without proper overview of several simultaneous projects, project controlling became increasingly difficult.

## Solution:

By integrating proRM Fast Start in its existing Dynamics 365 Sales organization, the company eliminated media disruption between sales and project management. With exact time and expense tracking and simply created invoicing, the error rate in



- ✓ a seamless solution
- ✓ increased efficiency
- ✓ streamlined approval process
- ✓ improved project controlling



invoices could be reduced by 25%. Project managers have gained better overview of bookings via a structured approval management process and charts. The multi project and multi account view in the Project Gantt application of proRM Fast Start, helps them to keep track of project progress and KPIs.

**Result:**

proRM Fast Start improved the company's project management at every stage by eliminating media disruptions and providing it with more data during project delivery.

# Manufacturing enterprise - Microsoft Dynamics 365 Project Service Automation

## About the company:

More than a dozen different companies belong to this large multi-national construction group. The group has grown over decades and includes business units in several different countries that were added by acquisition. All companies work closely together on a variety of different building projects at various stages of construction.

## Challenge:

Having grown over many years, the group's companies were using different project management solutions. Since the business works with customers during multiple phases of their building projects, its processes are rather complex. Project managers were struggling to keep track given that the companies within the group were using different software and were not following the same processes. It was also difficult to find information quickly and to assign the best suited resources to a project task.



- ✓ **uniform solution across the organization**
- ✓ **streamlined processes**
- ✓ **increased transparency**
- ✓ **reduced administrative effort**



**Proposed solution:** Microsoft's project management app, Dynamics 365 Project Service Automation, provided a scalable comprehensive solution for the group and its individual companies.

**Result:**

With a uniform solution implemented across the group, its project processes could be streamlined. This has made it easier for project managers to keep on top of ongoing projects. Data visualization, charts and embedded intelligence additionally supports them in reporting, decision making and resource management. Transparency has improved for all involved, while documentation efforts have decreased by 15%.

# Professional services start-up – proRM Fast Start

---

## About the company:

A fast-growing software start-up company that develops and subsequently continuously improves e-commerce apps for B2C companies. It focuses on cloud-based software for its own IT landscape, actively using Office 365 tools and Dynamics 365 Sales for its sales processes.

## Challenge:

Previously, the company improvised managing its project processes, using Office 365 tools (mainly Excel) to track time and expenses and assign and keep track of project tasks. However, this was becoming increasingly confusing and resulted in a major error which disgruntled an important customer. Management was also having trouble creating reliable reports. It thus decided to implement a professional project management tool as quickly as possible to avoid running into any more issues that could threaten the business.



- ✓ **rapid implementation**
- ✓ **improved project controlling**
- ✓ **quick return-on-investment**
- ✓ **project managers empowered**



**Proposed solution:** Given its dynamic growth and existing Dynamics 365 Sales organization, considered implementing Dynamics 365 Project Service Automation. However, due to the need to act quickly and its as of yet small team, the company decided in favor of proRM Fast Start, to manage its projects in Dynamics 365 Sales.

**Result:**

After just two days, proRM Fast Start was readily installed in Dynamics 365 Sales, seamlessly integrating with the existing IT landscape. Simplified time and expense tracking, structured approval management and detailed project planning and controlling brings order into the company's project management processes.

The multi-project management view in proRM Fast Start has allowed managers to keep a close eye on KPIs and timelines to recognize potential problems early on.

The investment made was much smaller than implementing Dynamics 365 Project Service Automation would have been. The company achieved its return on investment after two months. Should it continue to grow and require a more comprehensive solution, it can upgrade easily to Dynamics 365 Project Service Automation.

# Manufacturing enterprise – Microsoft Dynamics 365 Project Service Automation + add-ons

## About the company:

The large manufacturing business that produces casting machines. In recent years, it has reinvented itself as a full-service provider, also offering installation and maintenance services for its products.

## Challenge:

The company has long been using Microsoft Project for project planning. However, other team members involved in the project business – most notably sales, accounting, and service professionals – were using department specific solutions. Its project business cycle is thus fractured, leading to slow and sometimes wrong decision-making. The manufacturer was also using a self-developed time tracking software. This was too imprecise and inconvenient to use for its technicians in particular, resulting in inconsistent time tracking and error-riddled invoices.



- ✓ **all project processes combined in one solution**
- ✓ **precise time tracking (incl. with mobile app)**
- ✓ **increased control for project managers**
- ✓ **Microsoft Project integration**

**Solution:**

By implementing Microsoft Dynamics 365 Project Service Automation extended with the proMX Project Management Add-ons, the company could unify its entire project cycle in one solution and meet its requirements for precise and simple time tracking.

**Result:**

All persons involved in projects in various roles now use the same solution. Project managers can still plan projects using Microsoft Project, due to its native integration with the Dynamics app. Field technicians use the intuitive Time Tracking app from proMX to conveniently and precisely track their working time on project tasks – even while at customer site via a mobile app. Bookings are less prone to errors and project managers have additional control over bookings via the Approval Manager app.

# Manufacturing SME – Dynamics 365 Sales & proRM Fast Start

---

## About the company:

The company is a small automotive supplier. Its high-quality parts have made it an in-demand supplier for a small number of high-end car makers. It produces at one location only and has grown from a small family-owned business to a crucial partner for luxury car makers.

## Challenge:

The company's IT expertise is limited. It uses Microsoft Excel to organize its recurring projects. Time tracking is partially done manually. However, it has been struggling with its workload, meeting deadlines, and staying in budget. It operates in an increasingly competitive market and fears losing its longtime customers to competitors in lower-cost locations. It recognizes the need to professionalize to keep its competitive edge.



- ✓ **sales and project processes professionalized**
- ✓ **accelerated invoicing**
- ✓ **cost reductions**
- ✓ **productivity and revenue growth**



**Solution:** While the company faces significant issues with project management, its problems also stem from a disorganized and barely professional sales process. It thus decides to implement Microsoft Dynamics 365 Sales to better organize its sales processes and add proRM Fast Start to streamline its project processes in the same solution.

**Result:**

The manufacturer now has an easy-to-use solution that combines sales and project management. Adding proRM Fast Start to Dynamics 365 Sales has kept costs low. With extensive learning materials available, staff has not needed extensive training to use the project management app.

For its recurring project, the company uses project templates in the Project Gantt feature. Thanks to the simple and precise time tracking functionality and a streamlined booking approval process, invoices rarely contain mistakes and billing occurs much faster.

Better project planning and controlling has led to an improved workload and lower costs. Productivity and revenue have increased.



## Discover our customer projects

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

<https://proMX.net>

<https://proRM.net>

 **look@proMX.net**

 **+49 (9 11) 81 52 3-0**