



Professional Services

Automation: how services companies can keep up with customer expectations

WHITE PAPER



Content

- 1. **Introduction**.....3
- 2. **Challenges in the services industry**4
- 3. **Digital transformation is more than digitalization**.....5
 - Benefits of digital transformation for professional services companies.....6
- 4. **Made for service companies: professional services automation**.....7
 - Benefits of PSA software.....8
 - Microsoft’s PSA solution: Dynamics 365 Project Operations.....9
 - Complementary solutions.....12
- 5. **Case studies: Digital transformation with Dynamics 365**.....17
 - Case I: consulting firm with disconnected systems.....17
 - Case II: Management consultancy in need of modernization.....20
- 6. **Further reading**.....22

Introduction

Challenge and opportunity – there is a lot in store for services companies when it comes to digital transformation. Although discussions often revolve around the manufacturing industries, digital change presents professional services companies with many challenges, too. While it offers them plenty of opportunities to profit from process optimization with the help of digital technologies, it's also the cause of problems that need to be solved.

A modern, digital and transformed IT landscape is the answer to many concerns of the industry. It's also the key to more efficiency and productivity.



In this white paper you'll learn about the benefits of digital transformation for the services industry and about solutions that will increase your business's success. We will also introduce you to two of our most successful customer projects.

Challenges in the services industry

Services companies have to deal with the same old issues:



Growth

Revenue grows more slowly due to an increase in competition, and pricing pressure rises. Companies on the market must win over customers in terms of price, quality and service, which is only possible with perfectly streamlined processes.



Human resources

Many companies struggle to find qualified employees and win them over. Young professionals in particular have high expectations of their employers. For example, they would like to be able to work from home, with modern tools and within flexible hours.



Customers

To ensure consistent growth, service companies have to attract new customers and keep the ones they have. Good customer relationships and customer orientation are imperative.



Productivity

Employees often remain below their optimal workload and their maximum performance level. Often the reasons are inefficient processes, time-consuming routine tasks, and patchwork IT solutions that are spread across several disparate programs.



Project management

In the project-based service business, effective project management is essential. However, projects are often neither on time nor on budget, and problems or negative trends are discovered too late. This has a negative impact on customer satisfaction and lowers the likelihood of a follow-up order.

You can largely overcome these challenges by optimizing your processes and leveraging digital technologies (although technology isn't the answer to every problem), because digital transformation provides companies with higher performance software as well as a more complete overview of their processes, customers and projects.

Digital transformation is more than digitalization

Inefficient processes, makeshift software solutions and a heterogenous IT landscape – this is where digital transformation starts. However, it is not only about making manual processes digital and transferring data to the cloud.

Digital transformation is a continuous, holistic change process rooted in digital technologies. Digital technologies are used to make processes more efficient, companies more agile and employees more productive.

Our partner Microsoft defines four linked dimensions of digital transformation:



Engage customers



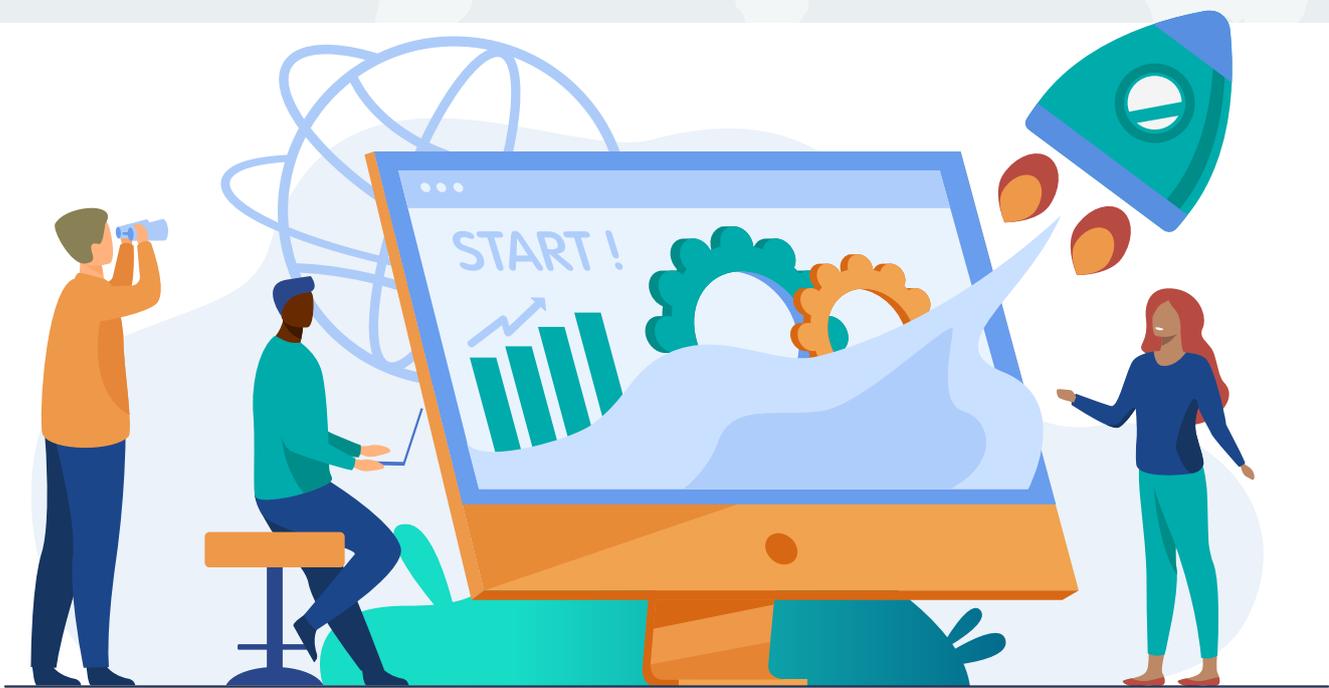
Empower employees



Optimize operations



Transform products



Benefits of digital transformation for professional services companies

More efficiency, increased productivity and improved agility are three great changes made possible through digital transformation. Benefits include:



At first, introducing new technologies and restructuring processes is a large effort financially and workwise. However, in the long run streamlined and automated processes will save you time and money in many areas.



Transformed products or digitalized services can generate more revenue. They attract new customers and strengthen the loyalty of existing ones by creating an improved customer experience.



Automation or more efficiency decreases certain costs. In other areas, AI-driven data insights can help you find opportunities for optimization.



The more seamless the processes and the more reliable the services, the more satisfied your customers. With the help of digital transformation, companies can act in a more customer centric manner and not only meet expectations, but exceed them.



Digital technology improves existing products, services and processes while opening up new opportunities in many business areas. Cloud computing requires fewer investments and enables faster prototyping.



A modern company attracts more qualified professionals. Employees are more satisfied with their jobs thanks to improved and smoother processes.

Made for service companies: professional services automation

There is a type of business software specifically made for service companies: Professional services automation solutions, or PSA. With these solutions, IT providers, marketing agencies, business consultancies and similar service companies can organize their processes – without working in disparate solutions, but with maximum transparency and efficiency.

Task	Without PSA software	With PSA software
 Tracking times and expenses	Manual recording of working hours and expenses in an Excel spreadsheet	Project-based time and expense tracking in the system with just a few clicks
 Gathering information	Retrieve documents from different analog and digital folders	Collect information sorted by project from one central location
 Assigning project tasks	Narrow down which employees are qualified and then compare their calendars	Choose the most fitting employees from the ones suggested
 Creating time-lines and cost estimates	Calculate rough estimates based on the project data with the help of a calculator	Feed the PSA software information about the project and receive reliable estimates
 Collaboration	Constant consultations with the sales team regarding customer requirements, sometimes cause long delays	Quickly check the requirements in the system, and the project team is good to go or to continue working
 Controlling projects	Necessity to keep asking involved teams about the current state of their work	View project progress on a dashboard
 Sending invoices	Gather billable hours, calculate costs, and transfer into the correct currency if necessary	Automatically create an invoice with the correct currency

Project management plays a key role here. The entire project cycle is covered by just one application. Normally service companies work is project-based, although PSA solutions are suitable for (larger) departments in companies that do project work and bill it to their customers.

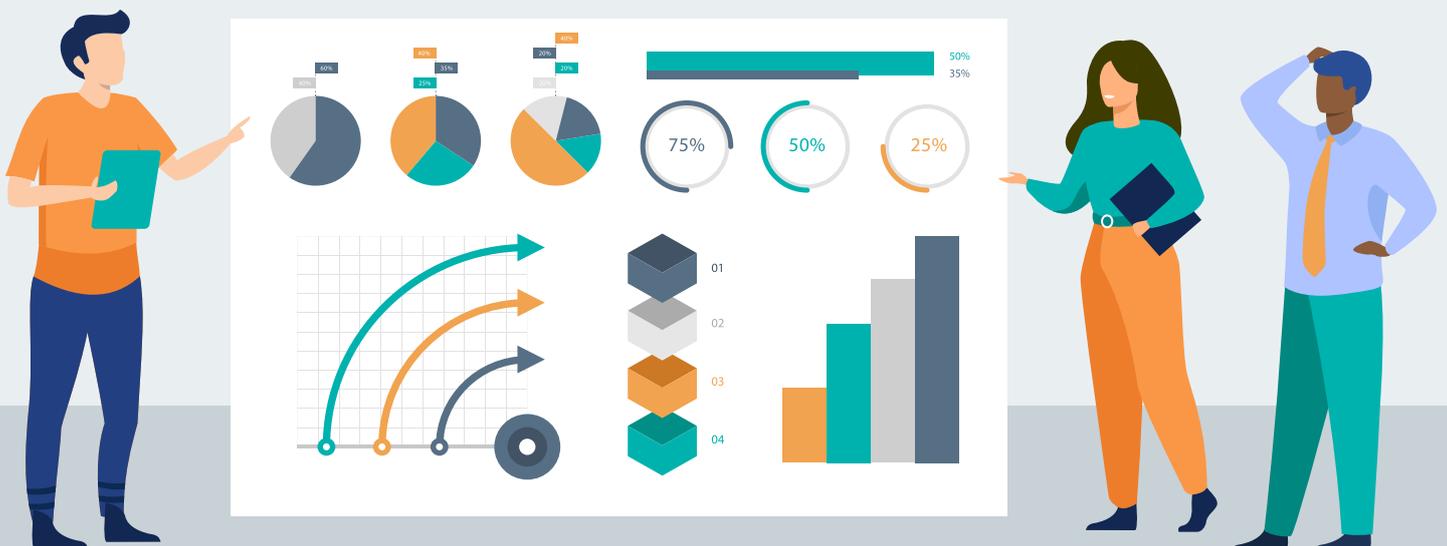
Benefits of PSA software

It is called Professional Services Automation because it centers on two things: services and automation. These systems take over all time-consuming and unproductive tasks from project members.

By combining all business areas in one solution, PSA software gets rid of data silos and supports transparency. If marketing, sales, project management, HR and accounting all use the same software to develop and optimize their business processes across different departments, each department and person involved benefits from having a better overview of what matters most to them.

Regarding the core business, PSA software simplifies the resource assignment for projects as well as planning and controlling them. Simple time and expense tracking guarantees fast, correct invoicing.

All in all, these functionalities and benefits result in sound decisions, stronger customer relationships and better results.



Microsoft's PSA solution: Dynamics 365 Project Operations

Microsoft's professional services automation software is called Dynamics 365 Project Operations. It is part of the Dynamics 365 family, a suite of business applications for various areas. All Dynamics apps are based on one data source – the Microsoft Dataverse – which lets you connect them seamlessly.

Project Operations combines CRM and ERP functionalities and covers everything a project-based company needs. Having all the essentials in one connected solution makes the project business more transparent, efficient and productive for everyone involved. This optimizes processes, speeds up project execution and maximizes rentability.

What Project Operations covers



Before the project

- Project sales
- Project planning



During the project

- Resource management
- Project management
- Productive collaboration
- Time and expense tracking
- Project controlling



After the project

- Billing
- Reporting

With the app, project members work in the same environment with the precise tools they need to fulfill their tasks.

Sales can start collaborating with the project team as soon as there is an opportunity. This way, project planning can be optimized right from the start. Project managers are able to see the status of an order, how likely a project is to happen and its estimated start date.

For **project planning**, project managers tend to fall back on Microsoft Project. Project Operations includes a Project for the Web workspace so they won't have to leave the application.

Resource management is made easier by the Unified Resource Scheduling tool (a common resource pool for all Dynamics 365 modules). It supports finding the best available resources for a project.

During **project execution**, Microsoft Teams supports the collaboration of project members with each other and with customers. Both internal and external members can exchange messages and documents quickly and easily: they can also schedule calls and video calls. Not only does this get rid of unnecessary e-mails, it also increases transparency for the customer and allows them to intervene in time if required.



Project managers have an overview of all the important numbers at all times: project progress, use of resources, costs, etc. Specialized dashboards help them track all developments in real time and make adjustments in time if deadlines, budgets or quality cannot be maintained.

Project Operations makes **time and expense tracking** significantly easier for project members. If they are assigned a work package, they only need a few clicks to track their working time or expenses precisely and forward it for approval to their respective project manager. Tracking is also possible via a mobile app or an Outlook plug-in.

As a result, this process speeds up **billing**. Out of all bookings submitted and approved, an automatic customer invoice can be generated. Project costs are calculated based on the hourly wage assigned to the respective resource and billed together with the approved expenses.



Benefits for service companies that use Dynamics 365 Project Operations

- Unifies all departments involved in a project in one seamless solution
- Enables close collaboration of sales and project management
- Generates more customer satisfaction through precise planning
- Delivers a sound foundation for business decisions

Dive into Dynamics 365 Project Operations with our experts!
Leave us a message, we will get in touch with you.

[BOOK CALL >>](#)

Dynamics 365 Project Operations is a comprehensive solution for project-based service companies. Just like all Dynamics 365 apps, it can be complemented seamlessly by other apps of the same business suite.

Two such apps that our customers often use in addition to Project Operations are Dynamics 365 Sales and Dynamics 365 Marketing.

Extending Project Operations with Dynamics 365 Sales makes sense, for example, when a company not only executes projects, but also sells products. The modules access a common contacts database, i.e. if any changes are made in one app, those changes will be applied to the contact in all other apps, too. This helps with managing data from different sources in one view.

Project Operations starts with the sales process. For service companies that want to invest in their marketing and professionalize it, we recommend Dynamics 365 Marketing. The app allows you to automate your marketing activities, personalize them and track the success of your endeavors.



Dynamics 365 Sales combines Customer Relationship Management (CRM) and sales automation. On the one hand, it helps sales teams to work (together) in a more organized manner because everyone involved has access to all relevant sales data in one location. On the other hand, it takes over many pesky and time-consuming tasks, thanks to embedded artificial intelligence (AI).

Using the application, salespeople maintain an overview of their customers and their history (phone calls, e-mail communication, offers, orders, etc.).

Among the most helpful features of Dynamics 365 Sales are:

01

Lead and opportunity scoring:

Embedded AI identifies the most promising leads and sales opportunities using scoring rules. Employees can then prioritize their tasks to land the biggest possible success.

02

Forecasts:

Dynamics 365 Sales delivers data automatically throughout the entire sales funnel. With this data, sales targets can be measured, risks identified, and profound, accurate decisions made.

03

Artificial intelligence:

Many tasks during the sales process can be automated with the help of AI, such as the creation of data sets, checklists or reminders. Additionally, AI can make intelligent suggestions and recommendations, e.g., to improve customer relationships that are at risk.



Advantages for sales teams using Dynamics 365 Project Operations + Sales

- Frees time for productive sales tasks by automating recurring tasks
- Establishes a workflow that renders processing more efficient and accelerates business deals
- Offers support in the form of artificial intelligence to maximize revenue
- Enables productive work from anywhere thanks to the mobile app



We would be happy to demonstrate the app in a free webinar. You decide which functionalities to focus on, and benefit from the insider knowledge of our Dynamics experts.

REQUEST WEBINAR NOW >>



Dynamics 365 Marketing unites all marketing processes in one app and creates an overview of potential customers from the first contact to the decision to purchase (and beyond).

As soon as leads are ready for business, marketing can hand all gathered data over to sales. That makes the app a logical choice for companies that are already using Dynamics 365 Sales and aim to automate their marketing activities, too. The combination of both not only fixes the problem of patchwork IT solutions that are spread across several disparate programs within one department, but between marketing and sales as well.

Via automation, the app saves marketers time, frees up resources and delivers data that leads to a better understanding of customers and helps them realize impactful marketing campaigns.

Dynamics 365 Marketing is particularly useful in the following areas:

01

Interactive customer journeys:

Automated multi-level customer journeys for various channels are at the core of the application. That enables marketing managers to regularly provide their contacts with valuable and relevant information, address them personally and offer them an excellent customer experience. The success of every customer journey and its individual touchpoints can be analyzed afterward, and content and strategies adapted accordingly. Hence, at any point in time marketing knows about the status of each contact and the effectiveness of different measures.

02

E-mail marketing:

The most reliable way to reach contacts is via e-mail. Dynamics 365 Marketing offers automated workflows for this, as well as templates that can be edited via drag-and-drop, possibilities to personalize the message and GDPR-compliant tracking. E-mails cannot only be designed in the style of the corporate identity but also personalized for the respective recipients and sent out at the best possible time.



03

Event management:

The application also supports the planning, promotion, registration and evaluation of webinars, workshops and other virtual and in-person events. Landing pages and online forms can be created swiftly via drag-and-drop and with adaptable templates. All registration data goes directly into the system.



04

Analysis:

Real insights into the interactions of the contacts with content, advertisement, and e-mails, displayed on dashboards and in reports, replace mere gut feeling and estimations. Marketers are able to better evaluate their customers, they can personalize the follow-up contact and prioritize leads based on objective Key Performance Indicators (KPIs). That leads to improvements in ROI.



Advantages for marketing teams using Dynamics 365 Project Operations + Marketing

- Offers a 360° view on all contacts and helpful insights to optimize campaigns
- Combined with Dynamics 365 Sales, it helps improve collaboration between marketing and sales
- Results in more generated leads and faster business closures
- Enables personalization of content

Discover the benefits of a single comprehensive marketing automation tool in our webinar about Dynamics 365 Marketing.

BOOK WEBINAR >>

Case studies: Digital transformation with Dynamics 365

proMX has achieved several transformation projects with professional services companies. As a Microsoft Solutions Partner for Business Applications, we help players from this industry to rethink their processes in project management, sales, marketing and beyond, and to map them accurately in the cloud.

The following two cases represent common problems our customers ask us to solve and the results they can observe after our work.



Case I: consulting firm with disconnected systems

The project:

Size: Medium (~80 employees)

Products:  Dynamics 365 Sales
 Dynamics 365 Project Operations
 Dynamics 365 Marketing

Summary:  Successful migration of all business processes to one comprehensive Dynamics 365 environment

 Seamless integration of all Microsoft applications in use

 Simplification of resource management and collaboration

 Synchronization of Project Operations and Outlook

About the company:

For decades, the consultancy has been supporting companies in terms of business strategy, organization and transformation. Its customers are spread around the world, and it employs about 80 people.

Challenges:

Due to using multiple disparate systems for sales, marketing and project management, workflows are inefficient and the collaboration across departments can be tedious at times.

Resource management is a good example to illustrate the inconvenient processes that result from that: resource managers need to compare workshop requests manually with the calendars of coaches, trainers and consultants to check their availabilities.

Solution:

To connect the processes of the consulting firm and to centralize all data, a solution needed to be built that is connected seamlessly, equips all areas of the company with effective tools, and creates transparency between departments. Our proMX experts recommended and implemented three Microsoft solutions: **Dynamics 365 Sales, Dynamics 365 Project Operations and Dynamics 365 Marketing.**

All applications are integrated with each other and seamlessly connected by Microsoft Dataverse.

proMX migrated the existing processes into a newly-built Dynamics environment and integrated all Microsoft applications that the company had been using thus far (like Microsoft Teams, Outlook and SharePoint).

Results:

All processes of the consulting firm – from order to payment – are now combined in one solution without any media disruptions.

The planning and management of project resources have been simplified using Universal Resource Scheduling in Dynamics 365 Project Operations.

Project Operations and Outlook are now integrated in such a way that scheduled appointments are automatically synchronized with the corresponding Outlook calendars.

The coordination among consultants was optimized as well. For example, it is possible now to send a request to a colleague with just one click, proposing to work together on a certain sales opportunity.

The transformation also led to the standardization of certain recurring tasks such as time tracking.



Case II: Management consultancy in need of modernization

The project:

- Size:** Medium (~300 employees)
- Products:**
-  Dynamics 365 Sales
 -  Dynamics 365 Project Operations
 -  Time Tracking for Dynamics 365
 -  Approval Manager for Dynamics 365

- Summary:**
- ✓ Switch from on-premises to cloud-based Dynamics 365 solutions
 - ✓ Replacement of legacy apps with modern versions
 - ✓ Extension of business capabilities with proMX add-ons



About the company:

The company, headquartered in Southern Germany, specializes in consulting organizations regarding process and management optimization. In its own academy, professionals are trained in these subjects. It has subsidiaries in Germany, Europe, Central and South America, and Asia, and employs around 300 people.

Challenges:

The consultancy's CRM system had become outdated. To realize its full potential, the company needed a modern tool for all departments to collaborate smoothly regardless of their location.

Solution:

The company had already been using an on-premises version of Microsoft Dynamics 365. To become even more flexible and to benefit from the constant updates and patches from Microsoft, it decided to switch to the cloud-based solutions Dynamics 365 Sales and Dynamics 365 Project Operations.

During the migration of the sales data, proMX and the company took the opportunity to remove outdated data, legacy applications and expired security models. Where necessary, deleted applications and models were substituted by modern versions.

To further extend the project planning and execution capabilities of Project Operations, proMX integrated its Dynamics add-ons Time Tracking and Approval Manager.

Results:

proMX invested a lot of time and effort in setting up the processes in Project Operations as intended by Microsoft. The work paid off: The management consultancy now has an efficient, coherent system with up-to-date data. The collaboration across international borders works with less friction and is more transparent. Onboarding is easier too for new employees thanks to structured processes.



Further reading



The essential guide to Microsoft Dynamics 365 Project Operations

How does Project Operations integrate project management, sales and finance functionality into one solution that helps overcome common internal and external hurdles in managing projects? Learn about the benefits and opportunities that Project Operations offers as well as how a Microsoft Solutions Partner for Business Applications can support you in implementing it.



How to boost your sales processes

Sales teams that want to be successful face a wide range of challenges. How can they deliver predictable and scalable results in times of constant change? Unlock the key to success in our white paper.



More than just newsletters: Why you need a marketing automation tool

Learn how marketing automation works, what you can achieve with it and how exactly you need to rethink your strategy.



More power for Dynamics 365

Users without programming skills are able to analyze and visualize data, build custom business applications, automate recurring processes and more. How? With the help of the Microsoft Power Platform that is based on the low-code applications Power Apps, Power BI, Power Automate and Power Virtual Agents. In this white paper, you'll learn more about the concept of low code and its potential for enhancing Dynamics 365.



Dynamics 365 apps by proMX

Are you looking to complement your Dynamics 365 solution and improve your productivity? We'd like to offer you a helping hand – with our products that have been developed based on nearly 20 years of collaborating successfully with Microsoft and our customers. Our white paper gives you an in-depth look at the advantages, use cases and more.

We offer a helping hand in your digital transformation

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!

www.proMX.net



look@proMX.net



+49 (9 11) 81 52 3-0



+1 (786) 600-3688

