



# DAPTIV FOR PROFESSIONAL SERVICES AUTOMATION

*“As a professional services organization, executing on services engagements profitably is critical to our success. Daptiv’s flexibility and ease of use gives us the ability to better manage time and resources, create custom applications that are unique to our business and improve collaboration among stakeholders.”*

SOVEREIGN CONSULTING INC.    Mike Renzulli, Program Director, Sovereign Consulting

## BUSINESS CHALLENGE

Many professional services firms have invested in customer relationship management (CRM) and enterprise resource planning (ERP) systems to manage their pipeline and business operations respectively, but rely on desktop productivity tools and spreadsheets to manage project execution. As a result, data related to critical service delivery is unstructured and siloed, resulting in inefficient and unreliable executive reporting for identifying risks, issues or resource needs. Furthermore, none of these tools provide a portfolio view of a services business to help the organization understand how a given practice

area is performing and what actions need to be taken. This can lead to some common challenges, including:

- Lack of pipeline visibility
- Sub-optimal resource utilization
- Poor project management and client satisfaction
- Burdensome time tracking and billing

Inability to monitor the state of the business to take appropriate action

## SOLUTION

Daptiv for PSA has been designed in partnership with leading Professional Services Organizations (PSO) to help you leverage your current investments in CRM and ERP systems by providing connectors to those systems; while Daptiv for PSA allows you to focus on resources, projects, and overall business performance.

### Key benefits include:

- Improved quality and predictability of services projects
- Enhanced visibility into the state of the business
- Automated time tracking and billing
- Reduced operational costs through streamlining of processes and integration of systems
- Optimized resource utilization



## CAPABILITIES

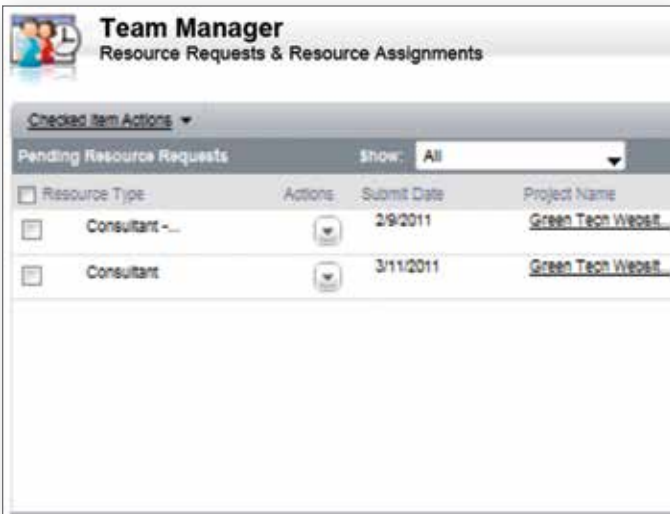
Daptiv for PSA offers a complete, integrated, and proven solution that provides real-time view into opportunities, resources, and financials; while allowing you to deliver on service engagements in a controlled and predictable manner.

### OPPORTUNITY MANAGEMENT

Daptiv enables management of client requests, business proposals, and sales opportunities. RFI, RFP, and SOW responses can be tracked and linked to the opportunities in your pipeline.

The screenshot shows the "daptiv PPM" interface. At the top, there are navigation tabs: "Dashboard", "Project Requests", "Projects", "Tasks", and "Documents". Below the tabs, there are options to "Create Project Request", "More Views", and "Page Options". The main content area is titled "Project Requests" and "Project Requests By Status". It features a table with columns for "Project Name", "Actions", "Priority", "Project Request Type", and "Budget". The table is divided into two sections: "Opportunity Status: Bid" and "Opportunity Status: Delayed".

Project Name	Actions	Priority	Project Request Type	Budget
<b>Opportunity Status: Bid</b>				sum: \$715,000.00
Sharepoint Implementation & Deployment		Medium	Customer Engagement Opportunity	\$365,000.00
OceanTek - Distribution Monitoring Solution		Medium	Customer Engagement Opportunity	\$350,000.00
<b>Opportunity Status: Delayed</b>				sum: \$350,000.00

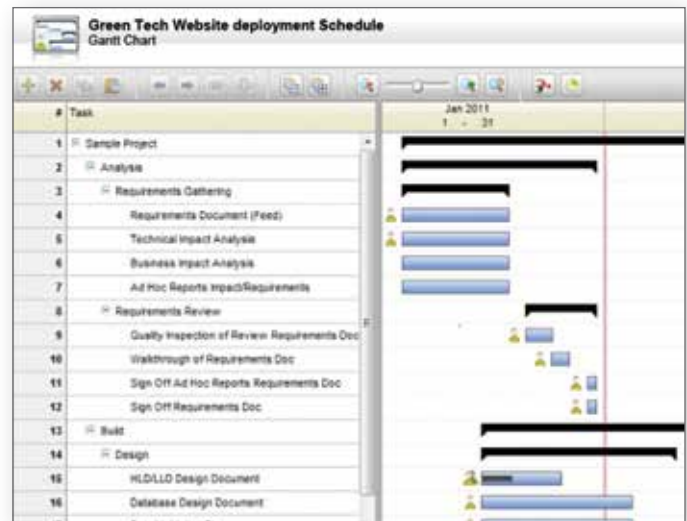


## RESOURCE MANAGEMENT

Resource management reports provide visibility into resource utilization and availability by resource names and resource types. Daptiv then enables a streamlined communication process between project managers and resource managers to easily assign resources to engagements.

## PROJECT MANAGEMENT

Daptiv equips project managers with robust features to improve forecasts, resolve issues, create accountability, spur collaboration, identify cross-project dependencies and deliver consistent project success. Project managers can manage all project tasks and milestones using simple “drag-and-drop” functionality. In day-to-day use of Daptiv, team members can view their tasks in a variety of ways and communicate project status to stakeholders.



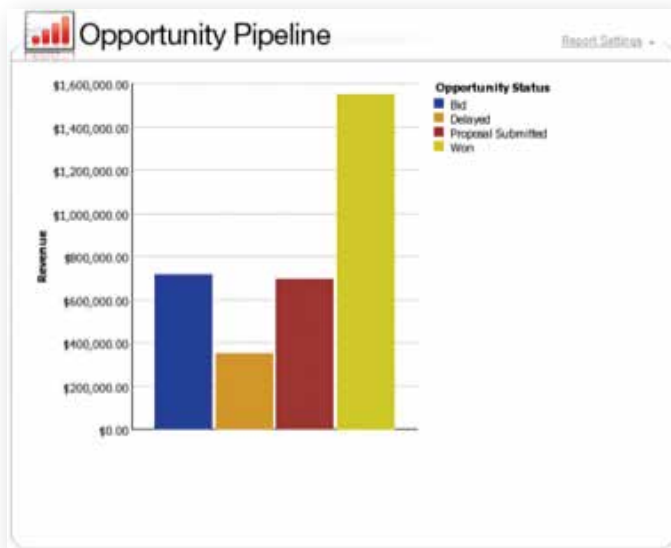
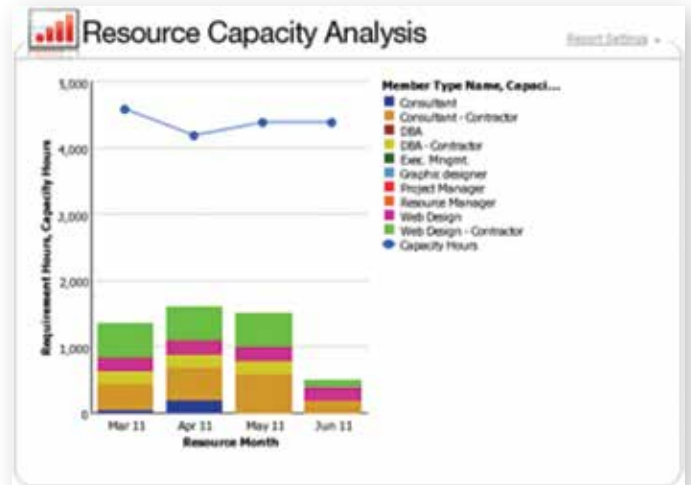
ABC Services, Inc.							
Invoice Report							
Period From > Feb 1, 2011 to Mar 1, 2011							
<b>Invoice Profile</b>							
Project Name	Client Name	Manager Full Name	Contract Type	Contract / PO #	Invoice Notes		
Green Tech Website deployment	Green Technologies	Alan Shefelvand	T&M Capped				
<b>Billing Contact</b>							
First Name	Last Name	Title	Business Phone	Email	Mailing Street	Mailing City	Mailing State / Province
Albert	Hall	Director		ahall@greentech.com			
<b>Billed This Period</b>							
Name	Description	Units	Rate	Cost			
Grant Green	DBA	6.00	\$200.00	\$1,200.00			
Grant Green	DBA	24.00	\$200.00	\$4,800.00			
Grant Green	DBA	62.00	\$200.00	\$12,400.00			
Grant Green	DBA	67.00	\$200.00	\$13,400.00			
Grant Green	DBA	72.00	\$200.00	\$14,400.00			
Pat Matrino	Web Design - Contractor	2.00	\$150.00	\$300.00			
Pat Matrino	Web Design - Contractor	20.00	\$150.00	\$1,500.00			
Pat Matrino	Web Design - Contractor	16.00	\$150.00	\$2,400.00			
Pat Matrino	Web Design - Contractor	34.00	\$150.00	\$2,550.00			
Pat Matrino	Web Design - Contractor	30.00	\$150.00	\$4,500.00			
Pat Matrino	Web Design - Contractor	35.00	\$150.00	\$5,250.00			
<b>Summary</b>		<b>368.00</b>		<b>\$62,700.00</b>			
<b>Expenses This Period</b>							
Submitted By	Expense Type	Expense Amount	Billed Expense				
Alan Shefelvand	Phones	\$400.00	\$400.00				
<b>Summary</b>		<b>\$400.00</b>	<b>\$400.00</b>				

## BILLING AND INVOICES

Daptiv can generate invoices or transfer data directly to an accounting/ERP system. Timesheet and labor rate data can easily be rolled up to an engagement or project level.

## PERFORMANCE MANAGEMENT

Daptiv allows important business KPIs such as utilization, leverage, value, and margin to be tracked. Status of key engagements/projects can be monitored and ROI can be compared across various practice areas. Dashboards and reports enable communication with employees on the status of the business.



## ABOUT US

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering adaptable PPM solutions and expert professional services. Daptiv's customers include world-class organizations such as Beam, Chase, Coach, Harvard University, Honeywell, InterContinental Hotels Group, and Virgin Australia. For more information about Daptiv's PPM solutions, please visit [www.daptiv.com](http://www.daptiv.com).