Accelerate Your Project Service with Microsoft Dynamics 365

Dynamics 365 for Project Service

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Microsoft

Agenda

Why invest in Project Service?

Project Service and Dynamics 365

Demonstration

- Project Service in Dynamics 365 overview
- Opportunity and Project Pipeline
- Identifying Contract Lines, Work Breakdown and Tasks
- Scheduling against Tasks
- Capturing Time Financials
- Aggregation of Project Information
- Power BI and analytics

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Learning Objectives

After this presentation we hope you:

- Understand business scenarios that warrant a closer look at project and resource management tools
- Understand the value provided by the D365 platform and the PSA work stream

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Industry Scenarios

- Contractors
- Non-Profit Volunteer Management
- Professional Services
- All Others

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Business Scenarios and Pain Points

- Who is nearby, Who is availablely on siloed desktop applications for visibility into Project status
- You rely on separate systems for time management
- You can’t see your future and current project pipeline in a single pane of glass
- You can’t on a single pane of glass see how a project is progressing and how you’re performing with progress to date
- Your resources don’t have visibility into their upc

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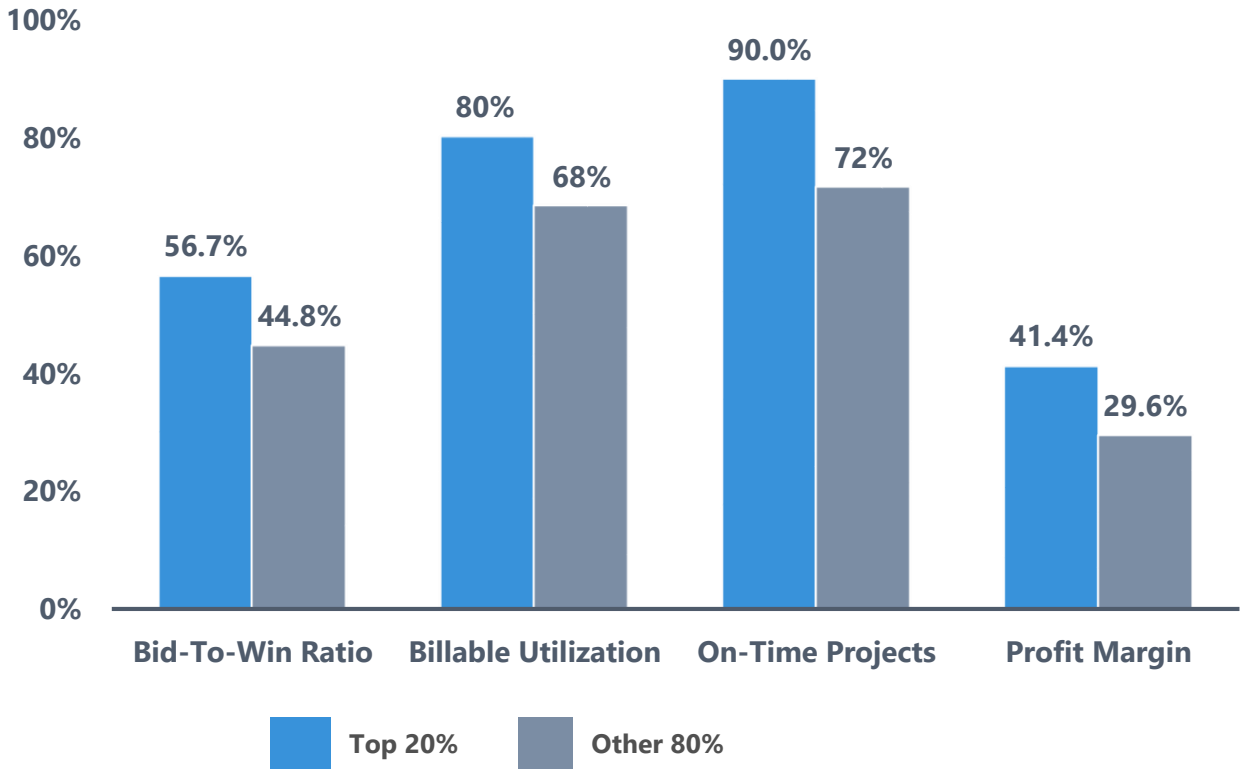
Process maturity drives business performance

Top 20% of organizations has implemented structured business processes and **utilize integrated information systems** to assure there is "one view of the business."



Contractor Workstreams

- Pre-Construction
  - Work breakdown Structure Based on Contract Lines
  - Resource Alignment and Soft-Booking
    - Both People and Equipment
- Construction
  - Task Management within WBS
  - Time Logs against Tasks
  - Timeline and Budget Consumption Visibility

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Additional Workstreams

- Volunteer Management
  - Ability to segment resources based on skill set and location
    - Both Volunteers and Equipment
  - Visibility to upcoming and ongoing Projects
  - Reporting on Project success metrics
- Professional Services
  - One process from lead to project closeout
  - Time/expense Logs against Tasks
  - Utilization and Realization reporting
- Others

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Where are my people? Consulting firm knows at a glance.

Wipfli LLP is one of the largest accounting and business consulting firms in the United States. To better track talent resource usage and forecasting in its technology consulting team, Wipfli uses Microsoft Dynamics 365 for Project Service Automation. With this tool, which connects to the company's Dynamics 365 customer relationship management and salesforce automation software, Wipfli resource and project managers can easily and accurately assess resource availability, staff projects, meet deadlines, maximize the profitability of its services, and speed time-to-revenue. Accurate staffing assessments also increase customer trust and deepen customer relationships.

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Products and Services

Microsoft Azure
Dynamics 365 for Project Service Automation
Microsoft Power BI

Organization Size

1,800 employees

Industry

Professional services

Country

United States

Business Need

Operational efficiency

Microsoft Dynamics 365

Office 365

PowerApps

Microsoft Flow

Common Data Service

Cortana Intelligence

Power BI

Azure IoT

AppSource

Finance and Operations

Customer Service

Sales

Talent

Retail

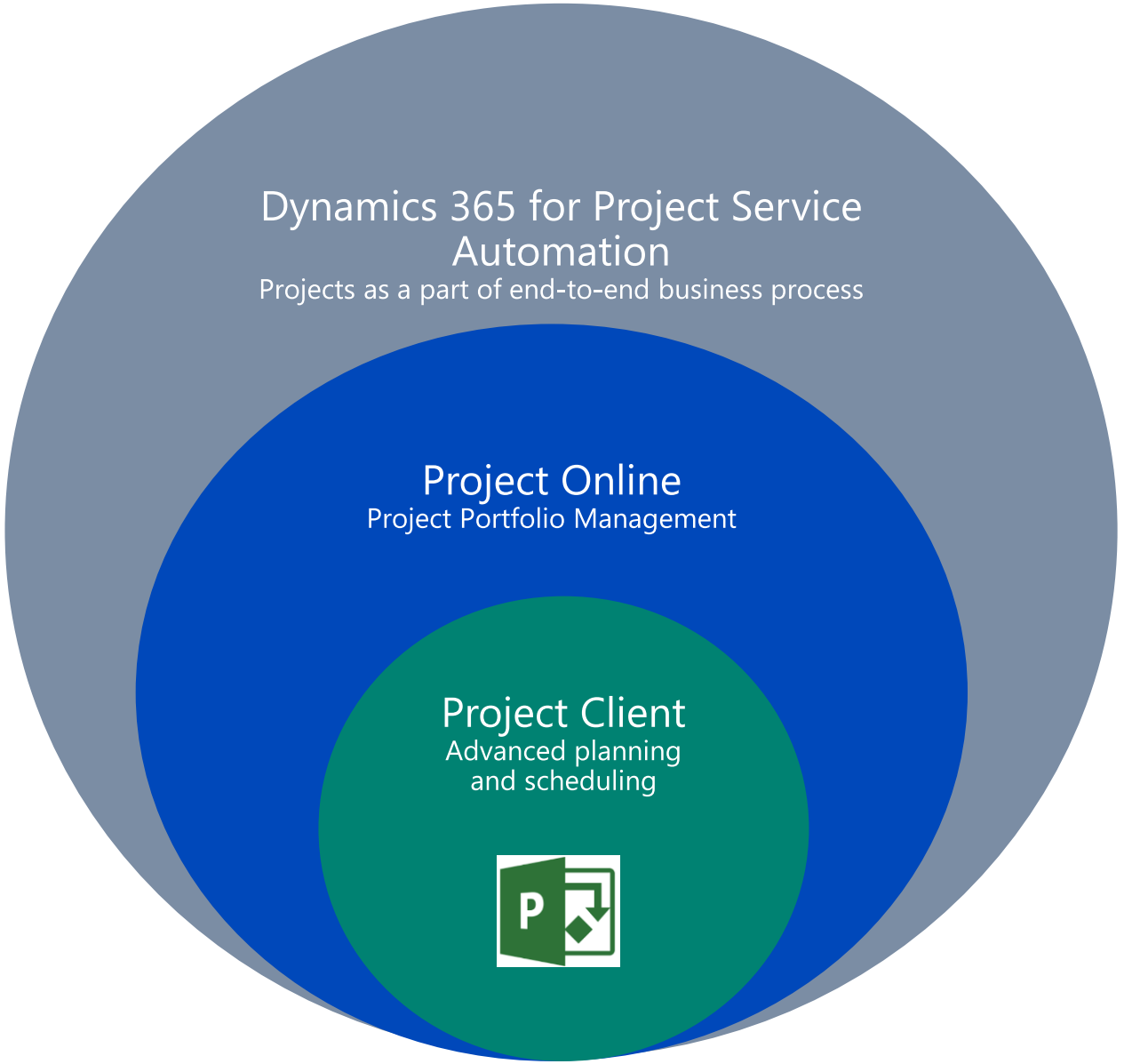
Marketing*

Field Service

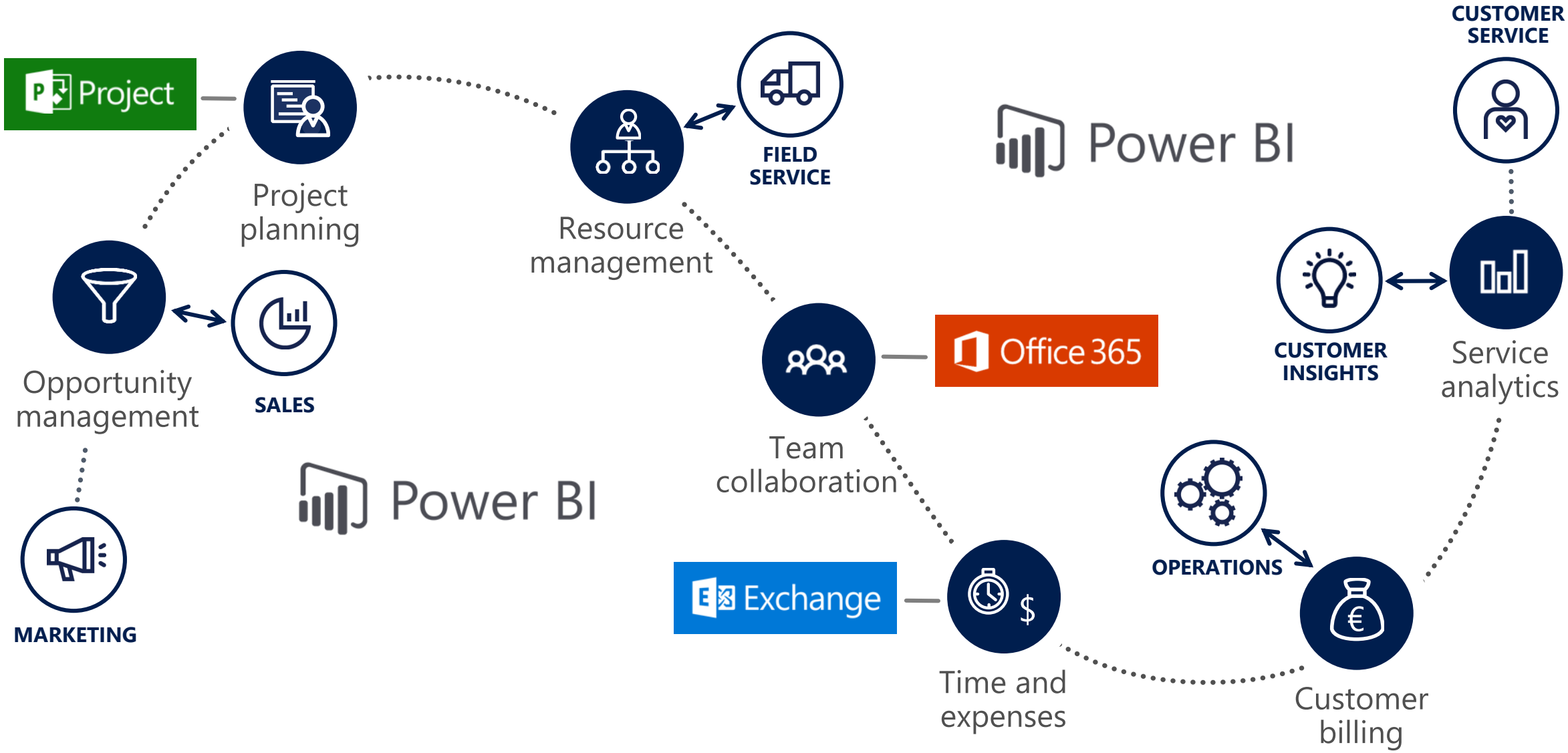
Project Service Automation

*Brought to you by Adobe Marketing Cloud

Solutions for Project-based Organizations



Dynamics 365 for Project Service Automation



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Dynamics 365 for Project Service - Demo

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