

High Performance Through Organic Growth & Productivity

The next generation professional services organization is faced with a wide spectrum of business imperatives and challenges to ensure on-going success and profitability. Flexible technology solutions designed specifically for project-based organizations have aided best-in-class firms in establishing the optimal balance of maximizing customer satisfaction; running a streamlined operation; and constantly increasing the efficiency of services and internal processes.

Business Imperatives

Focus on Business Development to Drive Growth

- High performing Professional Services firms leverage client insights & all client touch points to streamline nurturing and growth of their top clients.
- Identify trends & optimize client lifecycle management; Offer client specific services & billing rates by client segment, i.e. top-tier clients, vs. bottom-tier clients, vs. prospects & long shots.

Increase Revenue Generating Client Face Time

- Increase revenue generating client face-time; Integrated, role-based time entry & approvals, invoicing, collections & client case administration.
- Spend less time on client account administration & increase value generating client face-time by ensuring processes & controls are in place to ensure accurate & timely invoices.
- Avoid client confusion, unnecessary disputes & delayed payments through transparent & granular invoices that drill-down to billed hours, expenses & rates.

Drive Down Operational Costs by Boosting Value-Add Productivity

- Capture accurate, relevant & actionable client & account information. Streamline to enable interactions seamlessly across all points – wherever, whenever, whoever, and however a user chooses.
- Save time & boost enterprise productivity by providing role-based snapshot views of client & project status – including campaigns, leads, opportunities and 360 client views (billable hours, invoices, receivables / collections).

Solution Highlights

- ✓ Return on Investment Framework to benchmark and measure tangible results
 - Increase quality / segmentation and differentiated offerings
 - Increase percentage of organic growth and repeat business
 - Increase pipeline & revenue predictability / accuracy
 - Increase customer satisfaction & loyalty
- ✓ Rapid implementation with pre-configured modules:
 - Leads & Opportunities Management
 - Client / Account Profile Management
 - Contact & Event Management
 - Hierarchies, such as client, company, (Sub)-Industry
 - Business KPIs
 - Role-Based User Interactions

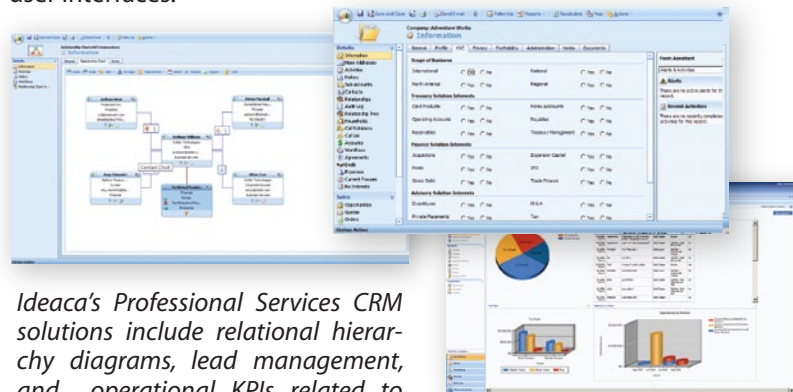
What Tools Are Required by High Performance Professional Service Firms to Grow their Business?

Empower sales, client management teams & executives with a complete 360o view of prospects & clients to provide:

- The right service offering,
- With the best rate
- At the right time.

Build deeper understanding of how your campaigns, service offerings, and engagement history provide value for your clients – resulting in more profitable & long term relationships with clients..

Improve profitability by improved operating efficiency through standardized tools & process rigour via simple, easy-to-use & familiar user interfaces.



Ideaca's Professional Services CRM solutions include relational hierarchy diagrams, lead management, and operational KPIs related to pipeline & revenue forecasting

What can you expect?

Rapidly Deployed, End-To-End CRM Solutions

We work with Professional Services organizations to rapidly deploy end-to-end CRM solutions that provide measurable results. Our team has a deep understanding of the Professional Service industry AND the experience to deliver a tailored solution from start to finish.

Below is a Return on Investment framework to benchmark & measure tangible results:

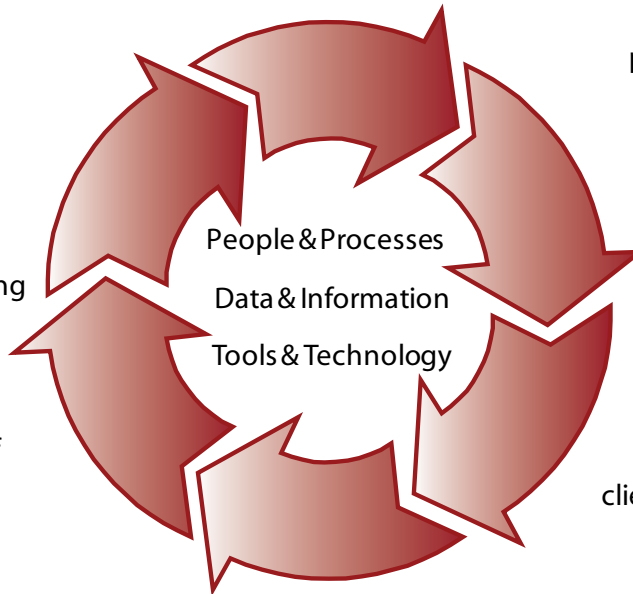
Improve pipeline & revenue forecasting.

Provide superior customer service to increase loyalty / revenue per customer

Complete client / account history improves understanding of how your products create value for them

Improve understand of client needs & respond more quickly to new opportunities

360 degree view of clients & prospects
- By segment, industry, service line offering -



Improve quality of client / account profiling & segmentation.

More clearly defined & profiled relationships & increase unique, differentiated opportunities

Increase organic growth / reduce cost of sales

Identify most profitable & repeat clients - offer specialized service + preferred pricing & discounts

Increase repeat business & client satisfaction.

Lock in clients, increasing loyalty and revenue per client / account

Increase % organic growth.

How Can We Help You?

Our experienced team of consultants coupled with our solution accelerators and an integrated software offering from Microsoft are all critical components to minimize your risk, optimize your performance and reduce your total cost of ownership.

To learn more about Ideaca and our Professional Services Solution Offerings call **1-866-816-IDEA x5157**, or visit www.ideaca.com/proserv



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