



### Customer Profile

McNally Valuations Inc. provides a complete range of valuation services as well as litigation support services, which involve a determination of economic loss. An independent, Edmonton-based firm, McNally Valuations Inc has provided professional services since 2002.

### Industry

Professional Services

### Location

Edmonton, AB

## Professional Services Firm Rapidly Deploys Dynamics CRM 4.0 in One Month to Streamline Project Management Process

*"The time for preparing management reports has been reduced from at least one full day to just one button click thanks to the solution implemented by Ideaca."*

**Michele Weldon, Director of Operations**  
McNally Valuations Inc.

### Business Situation

McNally Valuations is a fast-growing Alberta-based firm, focused on providing a complete range of valuation services and litigation support services. As their business expanded province-wide, project management had become challenging for McNally Valuations. Their current systems failed to provide a centralized interface for recording project data and making timely project reports. McNally required an easy to implement and rapidly deployable solution to:

- Manage on-going projects; including project profile, project resources, time entries and expenses
- Produce timely reports on consultant proficiency and profitability in a manner that only requires a single click
- Record and manage business accounts, contacts, leads and opportunities

### Solution

Ideaca designed, configured and implemented Dynamics CRM 4.0 for McNally Valuations Inc. in under one month. Some of the key components of the rapidly deployed solution include:

- A custom configured project management system in Dynamic CRM that significantly streamlines their project management process
- A time entry component customized to meet the needs for professional services, such as billable/non-billable time, billed/unbilled time, and defining standard and project specific billing rates
- CRM workflows to ensure the right tasks are assigned to the appropriate staff automatically, and to minimize re-entering data by carrying necessary information from leads into opportunities and projects
- Using out-of-the box CRM tools (report wizard and Excel export), reports were built to provide McNally management team as well as their consultants an easy way to quickly overview their most-recent performance

### Benefits

- Project status is managed in a centralized system and is shared across the entire team, so that a project will be ensured to deliver on time and on budget
- Streamlined project management by enforcing business rules and using workflows
- Improved project resource scheduling process and overall business health tracking due to ease of pulling a consultant performance report
- Reduction from one day to one click to pull management reports