



Why Professional Services Teams Choose **ProjectManager**

 ProjectManager



Challenges for professional services teams

From implementing hardware to maximizing billable hours, professional services teams across industries have the same goal of boosting margins and satisfying clients. Today's professional services teams help bridge the gap between expectations established during the sales cycle and the gained business value customers experience after implementation.

Through both selling services packages and encouraging the ongoing implementation of solutions, professional services teams drive revenue on behalf of their companies. Despite this crucial work, many teams still rely on outdated, disjointed tools.

Here are some overarching pain points that professional services teams face:

- ✓ Siloed tools make it difficult to track team workload and resource availability
- ✓ Minimal transparency around project details hinders visibility into profitability
- ✓ Project initiatives are spread across tools which reduces the quality of customer service
- ✓ Manual, inconsistent reporting makes it difficult to accurately capacity plan for future projects

If these obstacles resonate, consider an all-in-one solution such as ProjectManager. Our scalable and affordable project management software empowers professional services teams to elevate service delivery to the next level.

Practical benefits for professional services teams

Below are some common ways that professional services teams leverage ProjectManager's features.

- 1 Plan and track projects for more profitability**
- 2 Closely track team resources and workload for better outcomes**
- 3 See how your team is spending their time**
- 4 Reduce busywork and enhance collaboration with automated workflows**
- 5 Build reports in seconds and distribute to stakeholders**

Let's explore each of the above more in-depth.



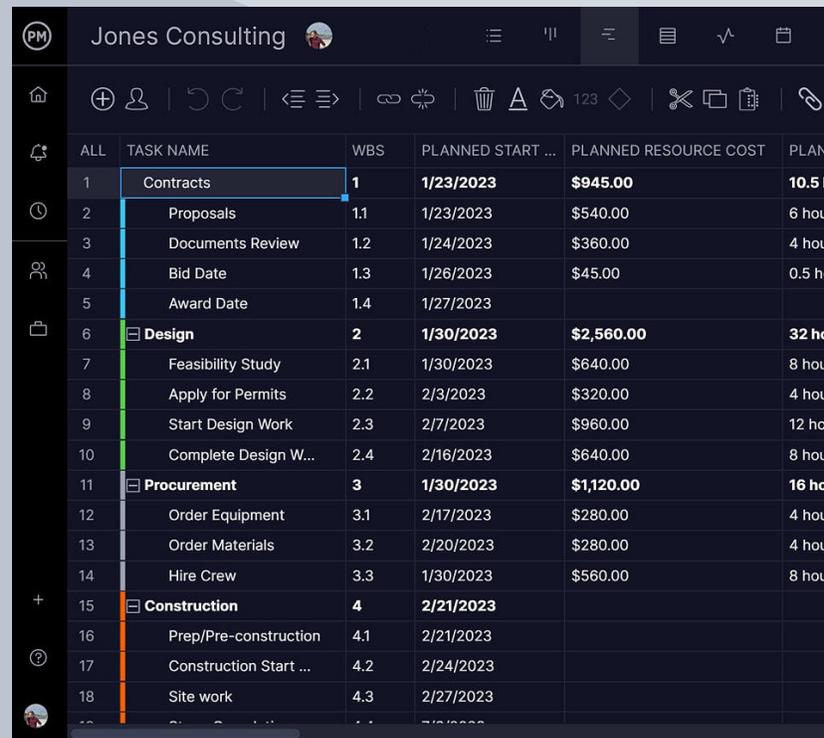
Total visibility and easy planning

Professional services managers must factor in objectives, project scope, deliverables, tasks, costs, standards, guidelines and much more during the project planning phase. Remote professional services teams might not have the visibility into urgent and essential project details when using disjointed collaboration methods and static documents.



Dynamic project planning

Planning and scheduling professional services projects that maintain healthy profit margins is easy with ProjectManager's robust Gantt charts. Plan long-term projects with ease thanks to these charts that update in real time. Break projects down into digestible tasks that directly monitor planned vs. actual effort and set project milestones and baselines. If client plans change, simply update the Gantt chart and your team will be instantly notified.



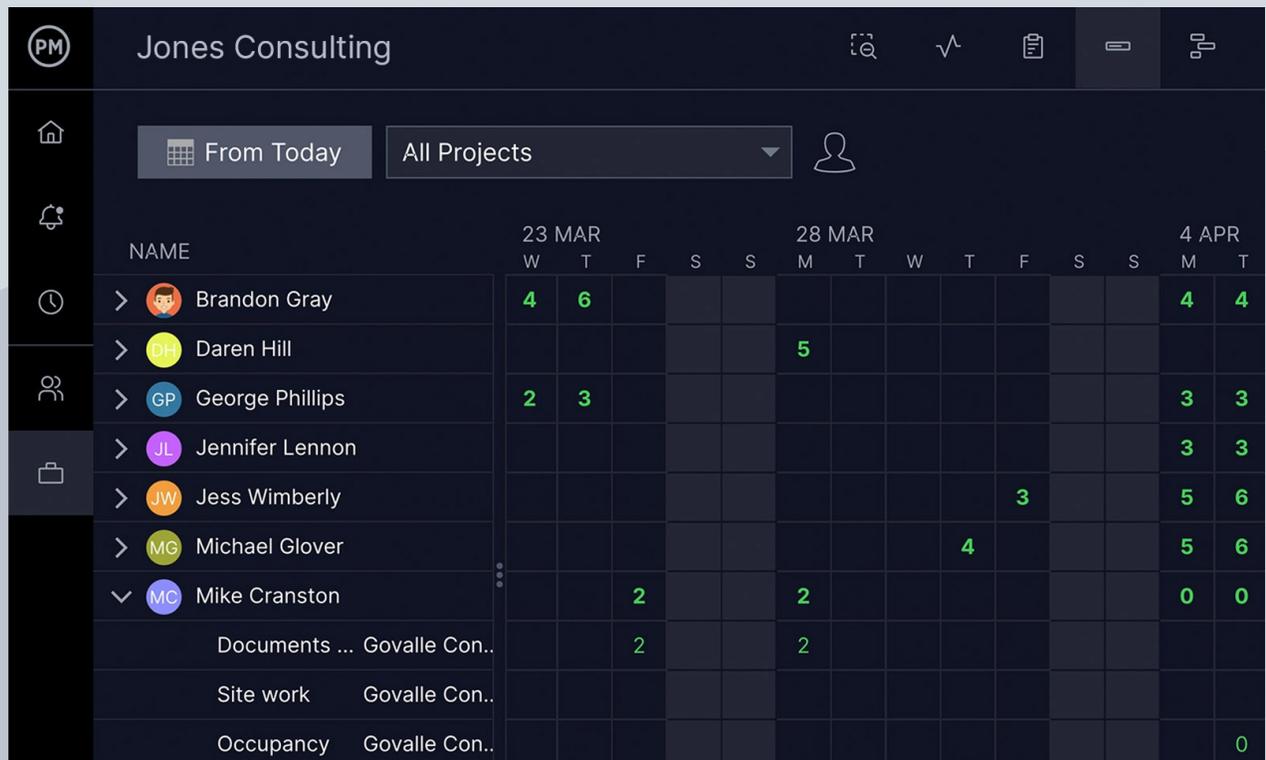
ALL	TASK NAME	WBS	PLANNED START ...	PLANNED RESOURCE COST	PLAN
1	Contracts	1	1/23/2023	\$945.00	10.5
2	Proposals	1.1	1/23/2023	\$540.00	6 hou
3	Documents Review	1.2	1/24/2023	\$360.00	4 hou
4	Bid Date	1.3	1/26/2023	\$45.00	0.5 h
5	Award Date	1.4	1/27/2023		
6	Design	2	1/30/2023	\$2,560.00	32 h
7	Feasibility Study	2.1	1/30/2023	\$640.00	8 hou
8	Apply for Permits	2.2	2/3/2023	\$320.00	4 hou
9	Start Design Work	2.3	2/7/2023	\$960.00	12 ho
10	Complete Design W...	2.4	2/16/2023	\$640.00	8 hou
11	Procurement	3	1/30/2023	\$1,120.00	16 h
12	Order Equipment	3.1	2/17/2023	\$280.00	4 hou
13	Order Materials	3.2	2/20/2023	\$280.00	4 hou
14	Hire Crew	3.3	1/30/2023	\$560.00	8 hou
15	Construction	4	2/21/2023		
16	Prep/Pre-construction	4.1	2/21/2023		
17	Construction Start ...	4.2	2/24/2023		
18	Site work	4.3	2/27/2023		

Real-time resource planning

Despite working on the same project initiatives, professional services teams may be spread across locations. This means that when using siloed project management tools, the project manager doesn't have the visibility to see team workload allocation. What's worse is that resource usage might not be closely tracked, threatening major deliverables to slip through the cracks or pull projects into the red.

Adjust workloads and resources

With software that updates in real time, it's easy to pinpoint inefficiencies or overallocations. ProjectManager's workload page provides real-time visibility into who's working on what to manage and reallocate resources from one location. Our workload page visually represents progress, estimated versus logged hours, task priority and more. Use it to catch bottlenecks and remove obstacles hindering success.



Total team visibility

Collaboration across professional services teams is challenging enough, but if your team is spread across locations and using different platforms, it's difficult to see how they're spending their time. As your team is your biggest asset in fostering strong customer relationships, it's essential to know who can take on additional tasks and who might be overworked as it is. Siloed or outdated timesheet systems are only a bandaid to this constant pain point.



Built-in time tracking

ProjectManager offers built-in time tracking tools with assigned approvers to closely monitor workload and make necessary changes. If approvals are required, your team can simply submit their timesheets without missing any important project updates. By marrying the visibility of timesheets with task-specific updates, it's easy to ensure accuracy and stay mindful of project budgets.

The screenshot displays the ProjectManager interface for 'Jones Consulting'. It includes a navigation sidebar on the left with icons for home, notifications, clock, people, and folder. The main area shows a table with columns for PROJECT, TASK, and dates (Mon 21st, Tue 22nd, Wed 23rd). The table lists various tasks and their corresponding hours. At the bottom, there is a 'Totals' row and an 'Updated' timestamp.

PROJECT	TASK	Mon 21st	Tue 22nd	Wed 23rd
Tillery Marketing	Brainstorm Ideas	0	4	3
Tillery Marketing	Generate Ideas	5	5	6
Govalle Construction	Site work	6	5	8
Govalle Construction	Stage Completion	0	0	3
Tillery Manufacturing	Stakeholder Feedback	0	0	3
Govalle Construction	Start Design Work	0	0	3
Totals:		11	14	26

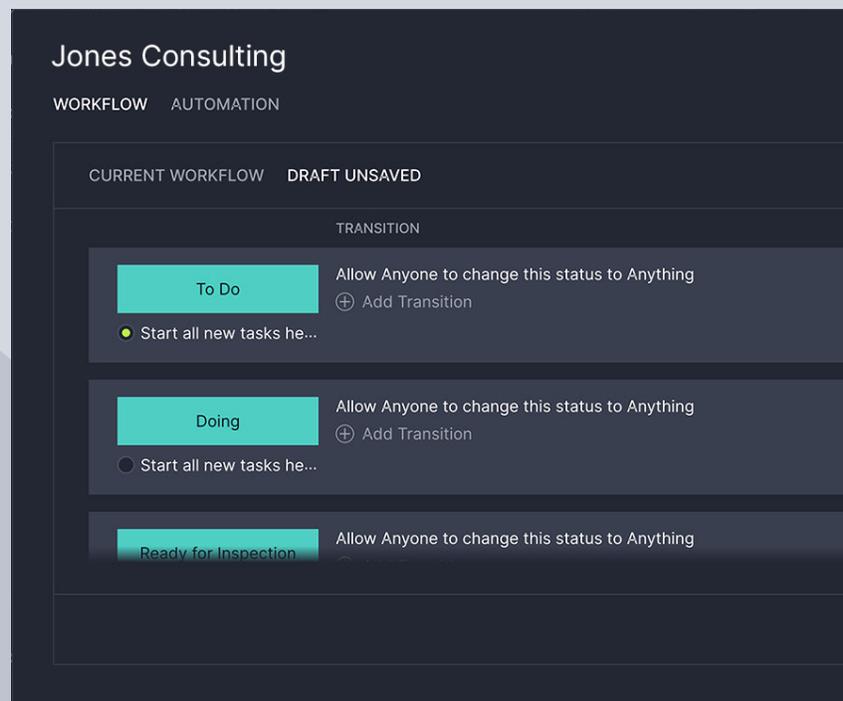
Updated: 23 Mar 2023

Automate workflows

Delivering timely projects is a hallmark of successful professional services teams. Even though professional services projects may differ slightly depending on the industry or customer, many projects utilize similar project plans and workflows. Collecting the necessary information and building the same workflows repeatedly will only result in lost time for professional services teams.

Reduce busywork and boost collaboration

Rather than repeatedly building workflows, professional services teams can use ProjectManager to build project plans and tailor workflows depending on project details. To maintain quality, set appropriate approvals so tasks can't move forward without the right approvals. Build your ideal workflow once and copy it for future use as you see fit. More automation means less busywork. The more time you can spend helping your clients, the better their experience.



Automatic reports



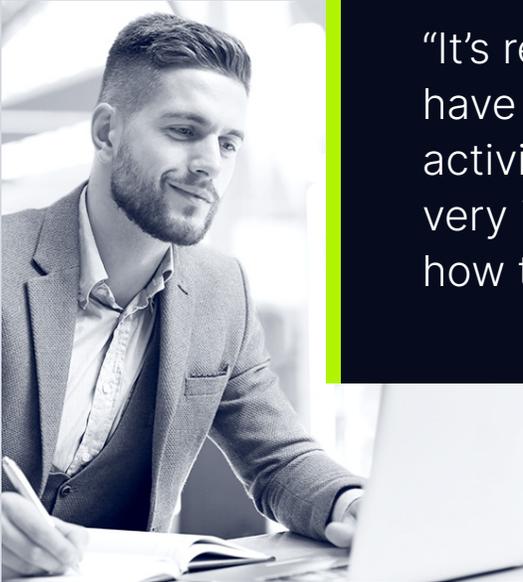
Customers want to stay involved as projects unfold so they're aware of updates or roadblocks that threaten the project. Moreover, data access gives customers and stakeholders an opportunity to provide feedback, helping them feel like a more integral part of the project's success.

Project dashboards and reporting

Professional services teams can utilize ProjectManager's tracking features, dashboards and reports to keep stakeholders informed about progress. All project data is automatically tracked and compiled into intuitive dashboards. In a few clicks, project managers can generate in-depth reports on project health, tasks, workload, progress, time and cost. Use our guest licenses to share read-only data with stakeholders without using one of your software licenses.



35,000+ happy customers



“It’s really interesting how people across the team have used ProjectManager to do all kinds of activities we didn’t anticipate originally. It’s also very intuitive to use. Within a minute, you can learn how to use the Gantt charts or kanban boards.”



Dan Smith
Head of Portfolio at CatSci

“ProjectManager has improved our work quality by 50 percent. We could never tackle the amount of projects we have if we didn’t have ProjectManager. The features are easy to use, the color coding is nice, and the fact that we can customize that made it for us.”



Stacy Kerns
Operations Manager at the Texas Health and Human Services Commission

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for yourself?

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