

Crowe Project Management

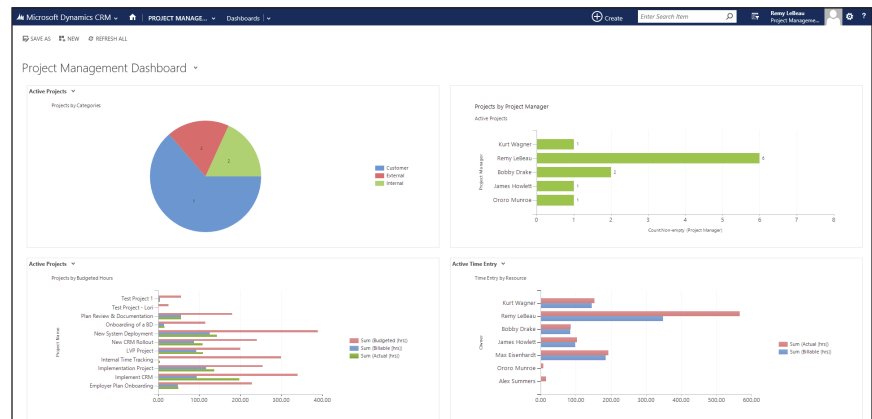
Integrated project management
for Microsoft Dynamics® CRM

Optimize project planning, improve project execution, and drive resource productivity through effective resource management and greater project and task visibility.

Professional services firms can be challenged with selling an intangible product that is difficult to quantify and ever-changing. Profitability requires that projects are estimated correctly and completed on time, while meeting or exceeding customer requirements. A well-defined and executed project management strategy, with Microsoft Dynamics CRM at its center, helps your organization streamline operations while allowing your people to share information, work together, and make effective decisions.

A powerful CRM platform

The familiar Microsoft Dynamics CRM interface helps project managers to do their best work with minimal training. Ease of integration with Microsoft® products and technologies helps expand the reach of CRM information to project teams and executive decision-makers.



Microsoft Dynamics CRM - PROJECT MANAGE - Projects - Implement CRM

Project: Implement CRM

Project Budget: \$568,000.00 | Actual (\$): \$326,000.00 | Estimate (\$): \$118,000.00 | Project Status: Pending

General

Project Name: Implement CRM
Account: Applied Systems
Category: Customer
Type: Implementation
Project Status: Pending
Start Date: 2/1/2015
End Date: 10/1/2015
Project Manager: Barry LeBeau
Percent Complete: 28

PROJECT BUDGET & BILLING

Billing Type: Hourly
Billing Rate Type: Project Bill Rate
Budgeted Rate: 340.00
Flat Rate: \$280.00
Project Budget: \$568,000.00

PROJECT TASK SUMMARY

Name	Task Status	Needed By	% Complete	Assigned To	Est. (\$)	Est. (\$)	Estimate (\$)	Estimate (\$)	Actual (\$)	Actual (\$)
2/1/2015 - Implementation Phase					144,000	\$280,000.00	4,000	\$90,000	4,000	\$880,000
UI Form Design	In Progress	11/16/2016	0%	Kurt Wagner	45,000	\$8,000.00	4,000	\$80,000	4,000	\$800,000
Server Installation & Configuration	In Progress	10/22/2016	25%	Lucas Bishop	30,000	\$6,000.00	0,000	\$0,000	0,000	\$0,000
QA / Testing	Pending	1/16/2017		Bobby Drake	60,000	\$12,000.00	0,000	\$0,000	0,000	\$0,000
Test CRM Plugins	In Progress	2/27/2017		Lucas Bishop	6,000	\$1,200.00	0,000	\$0,000	0,000	\$0,000
3/25/2015 - Go Live Phase					44,000	\$8,800.00	0,000	\$0,000	0,000	\$1,400,000
Go Live Documentation	Pending	12/23/2016		Max Eisenhardt	30,000	\$6,000.00	0,000	\$0,000	3,000	\$900,000
Administrator Training	Pending	1/3/2017		Barry LeBeau	6,000	\$1,200.00	0,000	\$0,000	6,000	\$1,200,000
End User Training	Pending	2/27/2017		Barry LeBeau	6,000	\$1,800.00	0,000	\$0,000	6,000	\$1,000,000
6/6/2014 - Requirements Phase					73,000	\$7,300.00	\$4,000	\$12,800.00	\$6,000	\$39,800.00
Business Requirements Documentation	Completed	9/1/2016	100%	Max Eisenhardt	20,000	\$4,000.00	20,000	\$1,600.00	10,000	\$14,000.00
Functional Requirements Documentation	Completed	9/1/2016	100%	Henry McCoy	30,000	\$0.00	16,000	\$2,800.00	20,000	\$4,000.00
IT Infrastructure Review	Completed	9/1/2016	100%	Alpha Team	10,000	\$1,800.00	21,000	\$4,200.00	26,000	\$2,200.00
9/25/2015 - Data Migration					154,000	\$10,800.00	26,000	\$5,200.00	79,000	\$15,800.00
Data Review	In Progress	1/31/2017	75%	Chris Muenzer	20,000	\$4,000.00	0,000	\$1,000.00	36,000	\$11,200.00
Customization and Configuration	Pending	2/27/2017	10%	Barry LeBeau	100,000	\$20,000.00	1,000	\$2,000.00	11,000	\$2,000.00
Initial Data Migration	In Progress	3/29/2017	50%	James Howarth	34,000	\$6,800.00	0,000	\$600.00	16,000	\$2,000.00
					410,000	\$76,000.00	54,000	\$13,000.00	188,000	\$25,800.00

Benefits

- **Increase operational efficiency.**
Easily manage projects with greater visibility and efficiency so you can make quick and accurate decisions and support the success of every project.
- **Preserve project profitability.**
Effectively allocate internal resources and increase billable hours through better alignment of project information and resources.
- **Streamline project accounting.**
Real-time dashboard gives you the visibility you need to see if the project is on time and within budget. Project managers can view whether the project is behind schedule or ahead of schedule.
- **Flexible time management.**
Easily capture project time through a single or bulk time entry view. Time entry approval workflows provide consistent operations for resource utilization and project billing throughout the project lifecycle.
- **Improve service.** Empower project managers with the tools and information they need to efficiently and profitably deliver high-quality projects and provide real-time customer progress reports for proactive customer management.
- **Monitor project and resource performance.** Track key performance indicators across the project through rich dashboards and reports, support time entry compliance and benchmark measure resource utilization across the organization.

Features	Benefits
Centralized project management	Centralized view of overall project information: project tasks, project team, budgets, milestones, resource utilization, and time and expense management.
Project templates	Create project templates to reduce administrative time and provide consistency when defining new projects.
Project task summary view	Real-time project task summary provides you with quick visibility into a project's estimated time versus billable time versus actual time spent for each project. Group project tasks by category for efficient project accounting and resource time management. The export to Microsoft Excel® spreadsheet software feature provides real-time project status reports for internal and external project reviews.
Task management	Convert incoming emails to a project task and assign a resource from within Microsoft Outlook® messaging software so you can respond to a customer change request more quickly.
Project automation	Customizable workflows and automated email alerts streamline task assignment and status updates, as well as facilitate communication across the project team.
Timesheets	Timesheets allow for quick bulk time entry. Record time for multiple customers, projects, and tasks from one simple interface. Use approval workflows to provide the oversight necessary to keep projects on track and within budget.
Invoice integration	Create an invoice that automatically pulls in project time entries so you can generate and send customized PDF invoices with just a few clicks (includes native integration to the invoice entity in Microsoft Dynamics CRM, which can also be used with other accounting software packages).
Expense tracking	Simple expense reporting features allow you to track nontime-based expenses related to a project for things like airfare, lodging, mileage, and entertainment expenses.
Dashboards	Real-time dashboards provide a quick graphical view of the current health of your projects. Identify which projects are on track and which are not. You can also drill down into the details to identify underlying problems for quick resolution.
Document management	Track project documents using notes in Microsoft Dynamics CRM, employ native integration with Microsoft SharePoint® file-sharing software, or use the Crowe Document Management software.
Fast, flexible, and easy to deploy	Get up and running quickly (typically 15-20 minutes) whether you use Microsoft Dynamics CRM online or on-premises. Regardless of your deployment, you get the same great user experience and project management solution.



Learn more

For more information on Crowe Project Management, visit ablebridge.com/contact

About us

Our experience is delivering CRM project success.

We have been implementing CRM technology from the inception of contact management applications through the evolution to sales force automation and ultimately customer relationship management (CRM) systems. Our logical CRM project implementation methodology is proven and is focused on project success.

We know Microsoft Dynamics CRM.

At Crowe Horwath LLP we are focused on Microsoft Dynamics CRM and the Microsoft technology platform. In 2016 we acquired AbleBridge, whose involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the market-leading CRM platform it is today. In 2006 AbleBridge made the strategic decision to solely focus on Microsoft Dynamics CRM and has never looked back. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook messaging software, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

Focused on success.

Crowe strengths are our people and their personal commitment to each customer engagement. Our logical approach, the quality of our effort, and the seriousness and professionalism we bring to the table have been the keys to our accomplishments. We measure our success by our customers' success.

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