



PROFESSIONAL SERVICES

Infor Professional Services Automation

Improve visibility into client activities

The Infor® Professional Services Automation (PSA) suite is an adaptable project portfolio management software solution for tracking and managing client projects. From people and processes to the technologies and finances that fuel their efforts, Infor PSA helps firms generate visibility and centralized control of client bids and sales proposals, project billable and non-billable activities, and optimize resource allocations. Here's a closer look at the capabilities that can power modern professional services firms.

Optimize margins and balance resource utilization

Success for professional services firms lies in optimizing margins and balancing resource utilization with market demand. To ensure client satisfaction, while also meeting financial, strategic, and operational objectives, business managers must:

- Assign the right resources to every client opportunity.
- Tightly manage work-in-progress (WIP) delivery costs, timelines, and project execution.
- Capture employee time and expenses promptly and efficiently.
- Deliver seamless billing, revenue recognition, and margin analysis.

Track and manage client projects

Infor PSA gives project managers the ability to manage all costs, resources, and schedules with an intuitive tool to achieve outstanding delivery efficiency, all while working in their native systems—right out of the box. Key capabilities include:

- Project management
- Project resource management
- Project scheduling with MS Project integration
- Project time and expense
- Project budgeting and forecasting
- Project portfolio assessments

Drive client satisfaction and enhanced profitability

With Infor PSA, firms get a powerful resource that can be used to drive client satisfaction and enhanced profitability. The system enables both client account managers and accounting managers to access the project information for real-time decision-making, while also allowing data to flow back and forth seamlessly to back office financial project accounting systems. With Infor PSA, professional services firms can:

- Gain visibility and centralized control of all client activities, including pending and in-progress projects.
- Manage opportunities and sales teams, while assessing and prioritizing pipeline based on potential margin and strategic alignment.
- Optimize resource allocations and commit to project timelines.
- Provide extensive reporting capabilities to keep business leaders and account managers informed.
- Improve margins and increase the rates of projects completing on time and under budget.
- Identify and mitigate issues that threaten profitability.
- Maximize resource utilization.
- Improve demand forecasting to avoid the threat of resource shortages.
- Accommodate international project delivery and financial teams.
- Use historical project data to negotiate better terms and improve profitability.
- Analyze performance to track improvements versus benchmarks.
- Determine where to concentrate resources and business development efforts.

Achieve outstanding transparency and control

Infor PSA gives project managers and finance teams the tools they need to achieve outstanding transparency and control, all while working in their native systems, right out of the box with no interface to build. Infor PSA provides these tools and functionality:

- Document templates to streamline processes
- Industry-leading bi-directional flow of data with Infor's tools for activity management (AC) and billing and revenue (BR) to optimize billing, revenue recognition, partner accruals, margin analysis, and vendor reimbursement
- Drag-and-drop staff assignment screens and cost templates to establish schedules, secure resources, set budgets, and complete project blueprints
- Capacity planning and utilization tools
- Project evaluation tools, including Gantt charts and revenue graphs
- Document management
- End-to-end project financial transparency
- Action item tracking and change order functionality
- Skills and role management, including proficiencies and experience
- Matrixed employee evaluations
- Flexible cost and rate schedule management
- Powerful weighted searching to locate the most qualified professionals for each job
- Margin and revenue tracking and variable cost schedules
- Configurable rate cards
- Best practice administration
- Earned value analysis
- Project team management and allocation
- Opportunity pipeline management
- Bi-directional Microsoft Project® interface
- Vendor management

Optimize and oversee entire client project portfolios

Infor PSA delivers a flexible and highly efficient system for overseeing and optimizing project portfolios. By linking critical project costing and resource data to key strategic initiatives, services firms can ensure optimal margin, resources, and delivery quality.

Deliver client satisfaction, while also meeting financial, strategic, and operational objectives in a unique project-based market.

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