Smarter Project Delivery Starts With Integrated Systems

Optimizing Efficiency with PSA, CRM, and Accounting Software

Oftentimes, professional services businesses fail to see the ways in which their systems are working against their project delivery, creating the very downsides to project management they strive to avoid.

This is where integrated systems come in. When you integrate your Customer Relationship Management (CRM), Professional Services Automation (PSA), and Accounting systems, you're setting your organization up for successful, smoother, and repeatable project delivery so you can focus on growing your business.

Customer Relationship Management (CRM) tools support interactions with customers and prospects

Professional Services Automation (PSA) tools streamline time tracking, billing and invoicing, and project and task management

Accounting systems process transactions and organize financial information

Benefits Of Integrating CRM, Accounting, And PSA Software

Seamless data flow

See a smooth exchange of data between your CRM, PSA, and Accounting software, eliminating the need for manual data entry and reducing errors.

Streamlined financial processes

Have simplified financial processes such as invoicing, expense management, and financial reporting, ensuring accurate and timely financial data.

Improved resource management

Get real-time access to resource availability to improve resource allocation and enhance your organization's project planning capabilities.

Scalability and growth

Integrated systems provide a foundation for scalability, allowing your organization to efficiently manage increasing customer demands, project complexities, and financial growth.

Data consistency

Experience data consistency across departments that minimizes discrepancies and enhances data accuracy and reliability.

Comprehensive customer insights

See a holistic view of customer interactions, preferences, and project requirements that enables you to provide personalized and efficient customer management.

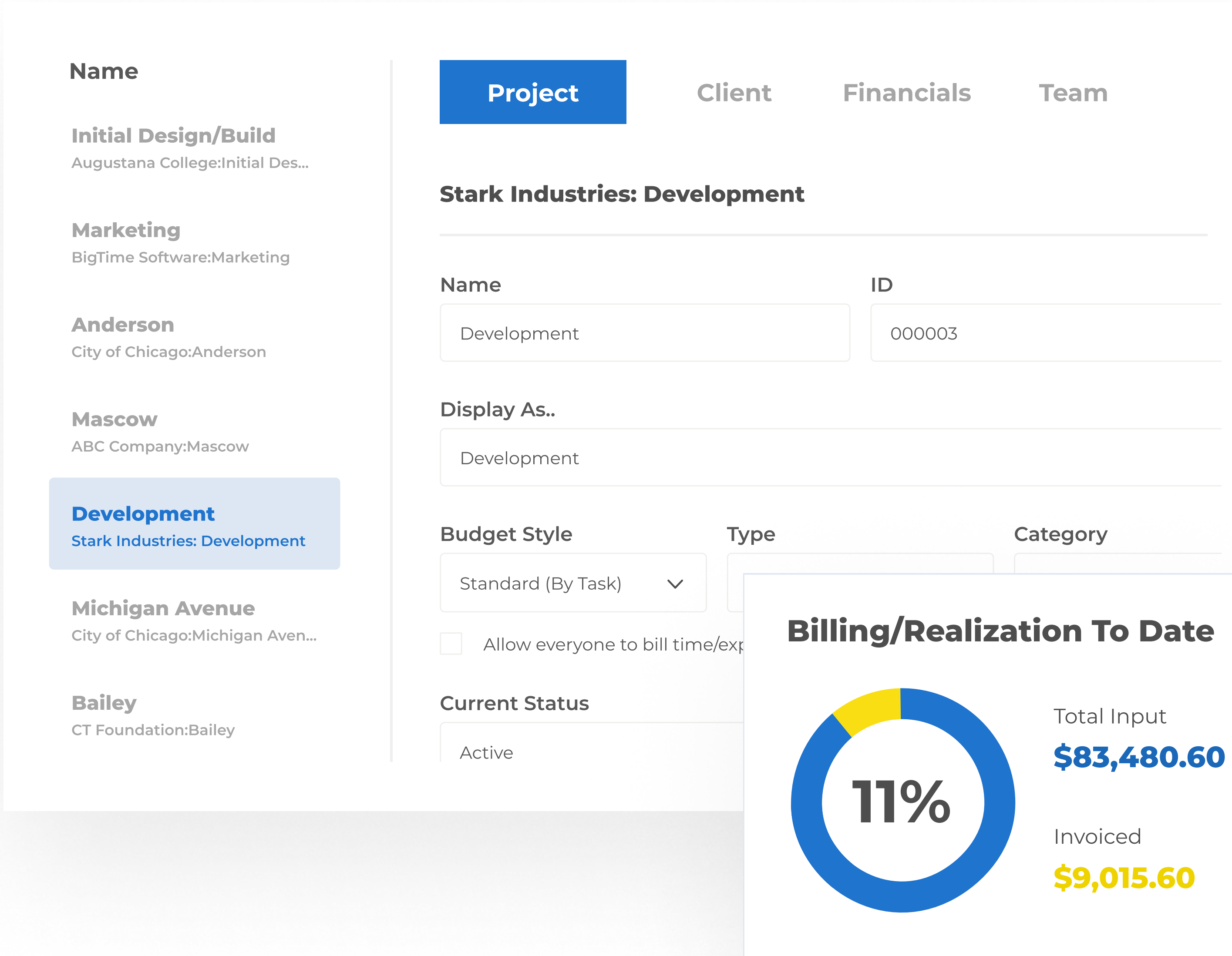
CONNECT WORKFLOWS

Throughout the Project Lifecycle to Increase Visibility

Stage 1 : Kick-Off Projects Faster

CRM + PSA Software

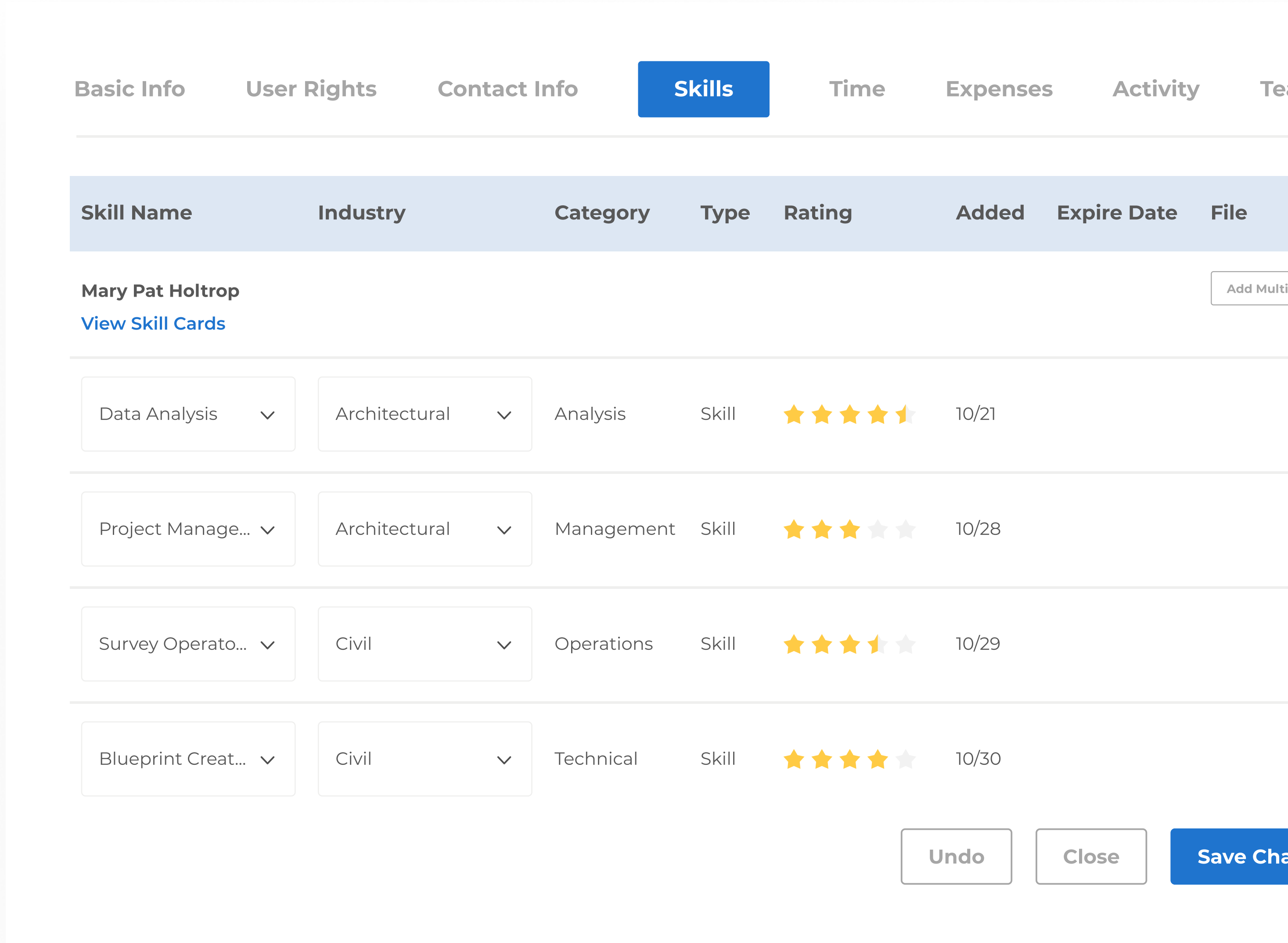
- Trigger projects to be automatically created in BigTime once they reach a certain lifecycle stage in your CRM.
- Add details to a project in BigTime and sync them to your opportunity in your CRM.
- Define the project scope better based on the available resources shown in BigTime.
- Leverage BigTime's intuitive reporting to see project forecasts enriched with your CRM data.



Stage 2: Strategically Assemble Strong Project Teams

PSA Software

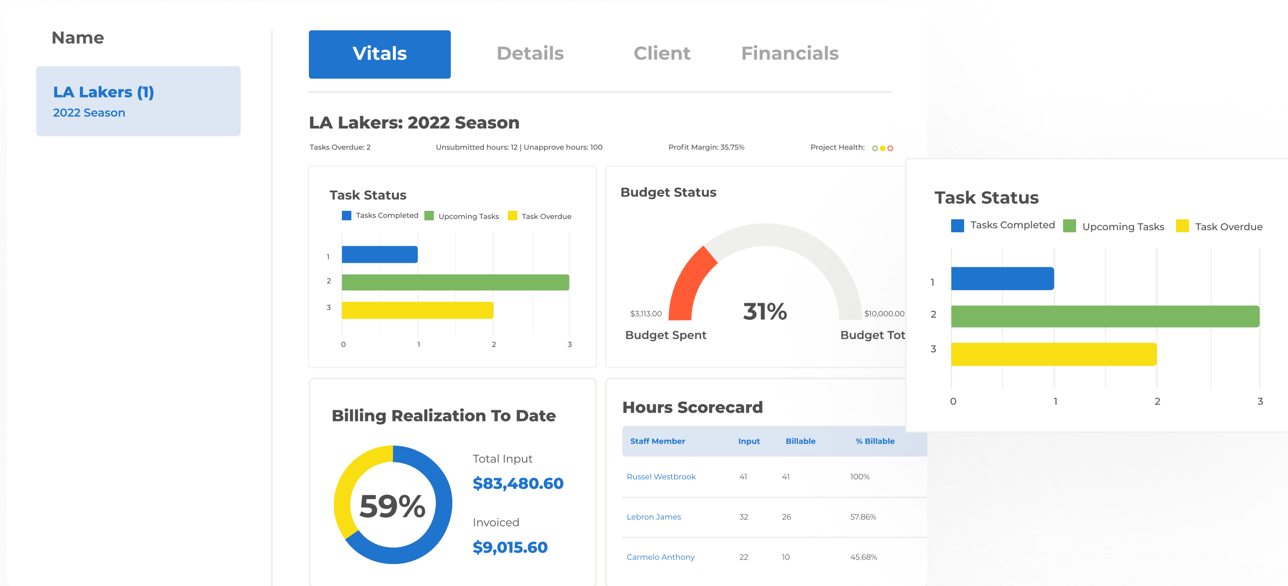
- Allocate resources based on skills, experience, and availability to increase billable hours and profitability.
- Forecast resource demand with precision based on project pipeline and business strategy.
- Account for PTO and global holidays when allocating tasks to resources.



Stage 3: Monitor Progress & Budget In Real-Time

CRM + PSA Software

- Coordinate budgets, schedules, and project scopes for accurate project oversight.
- Set up tasks for each project and assign hourly, fee, and expense budgets to track compared to actuals.
- Arm your client-facing team with more project details than ever before, by pulling up-to-date budget reports into your CRM.



Report Opportunities

Allocations+Actuals by Month

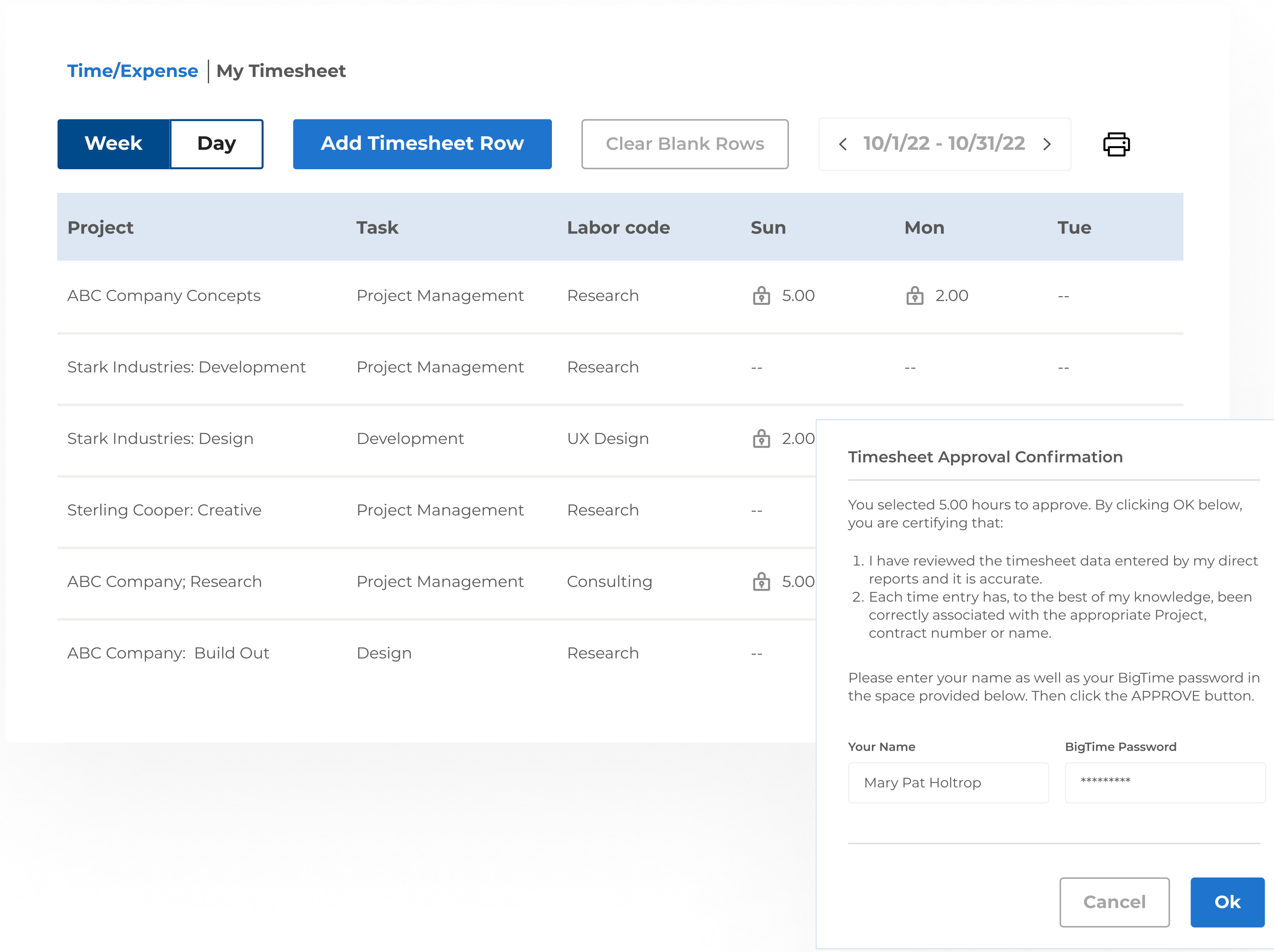
For opportunities that have BigTime projects attached, this report shows projected revenues in a pivot table (along with actuals).

Account Name: Account Name	Opportunity Name	Sum Projected Dollars	Sum Actual Dollars	Sum Billable Dollars	Sum Variance Dollars
City of St. Charles	Lincoln Park	$13,800.00	$0.00	$0.00	$13,800.00
	Subtotal	$13,800.00	$0.00	$0.00	$13,800.00
Holtrop & Co	Madison 101	$0.00	$1,600.00	$1,600.00	($1,600.00)
	Subtotal	$0.00	$1,600.00	$1,600.00	($1,600.00)
Midwest Consulting	Kimball St	$0.00	$0.00	$0.00	$0.00
	Subtotal	$0.00	$0.00	$0.00	$0.00
Total Amount		**$13,800.00**	**$1,600.00**	**$1,600.00**	**$12,200.00**

Stage 4: Reduce The Effort Behind Logging Time & Expenses

PSA + Accounting Software

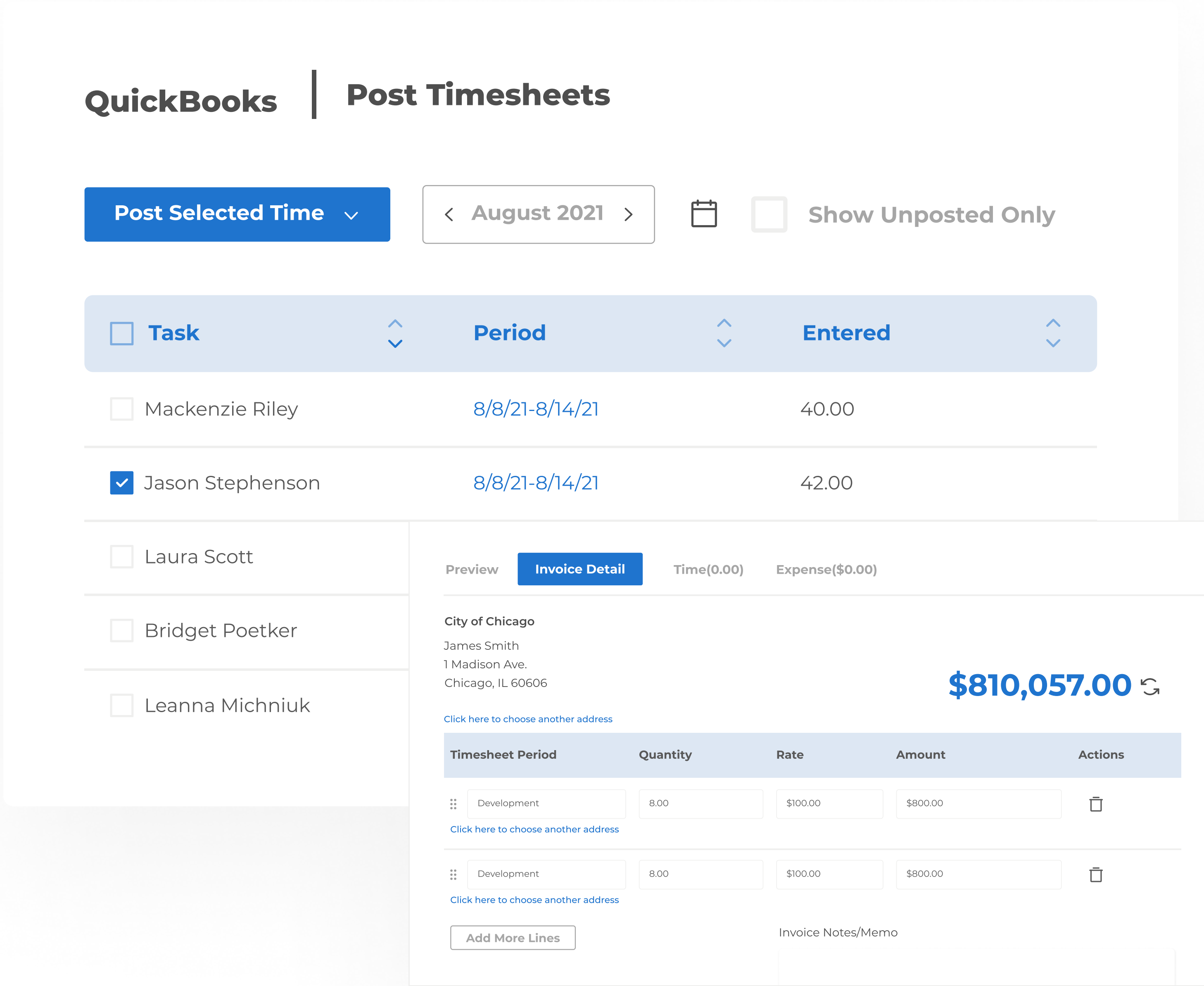
- Simplify the time and expense tracking process in BigTime while giving project managers access to the data they need to stay on track.
- Generate detailed time and expense reports in BigTime, providing valuable insights for project analysis, cost management, and client invoicing.
- Automate data flow from BigTime to an accounting system to ensure financial transactions are up-to-date in both systems for seamless tracking and reporting.



Stage 5: Invoicing

PSA + Accounting

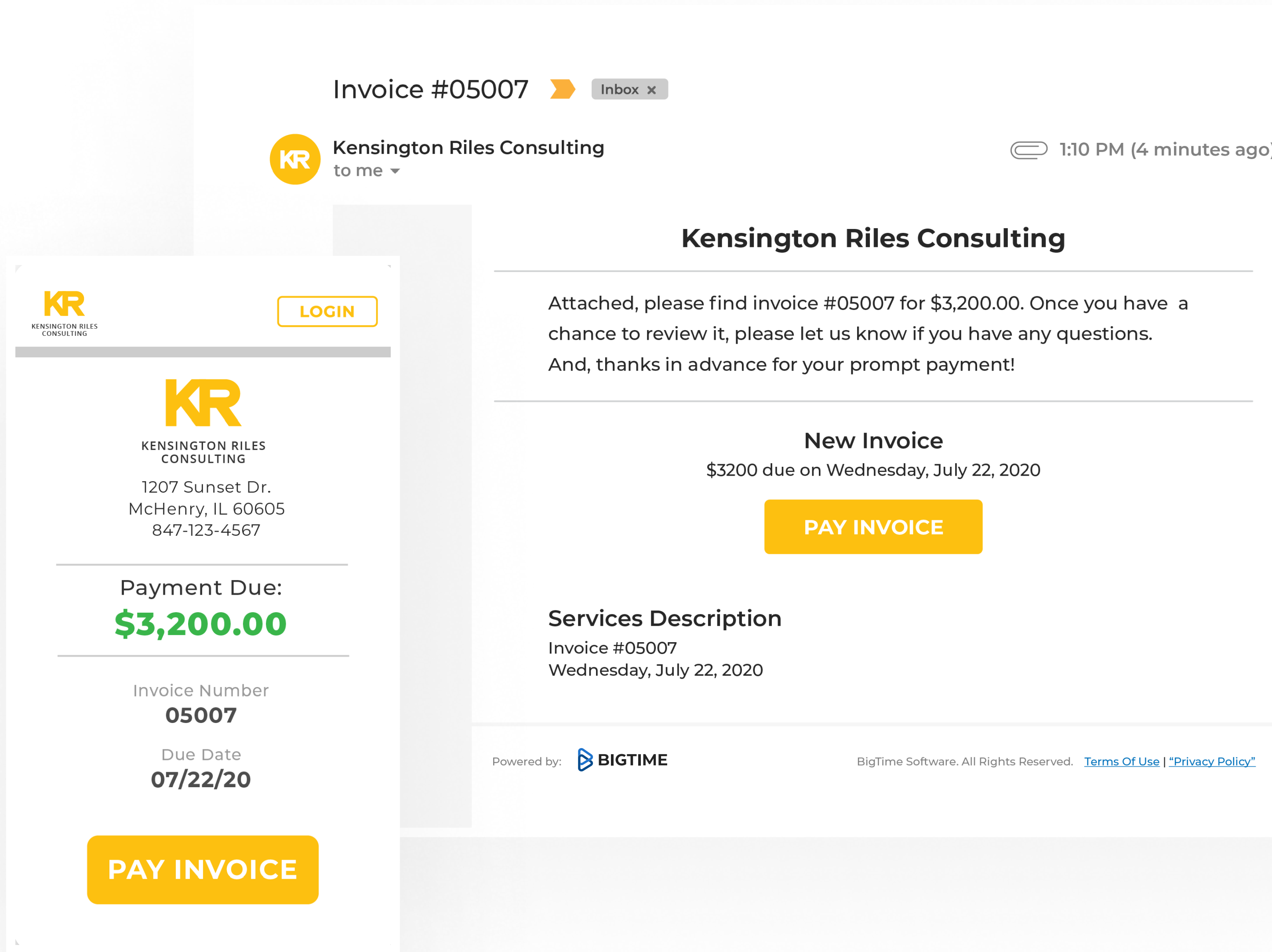
- Integrate BigTime with your accounting software to allow project managers to generate accurate and timely invoices based on project milestones, deliverables, or time-based billing.
- Build multi-level review and approval processes in BigTime for timesheets, expense reports, and invoices to accelerate sign-off and the time it takes to get paid.
- Post invoices created in BigTime to the accounting system for A/R tracking.



Stage 6: Payments

PSA + Accounting + CRM Software

- Record payments in both BigTime, your accounting system, and CRM for increased accuracy and visibility.
- Reduce the effort required to get paid for the work you do by giving clients the option in BigTime to pay by credit card or ACH.
- Get paid for work faster by invoicing quicker and incorporating automatic payments in BigTime through BigTime Wallet.



BigTime Customer Sees **50% Reduction In Billing Time**

You heard that right. Aegis Project Controls, a consulting firm and BigTime customer was able to achieve a 50% reduction in billing process time as well as a 50% decrease in financial administrative tasks.

Read Case Study CLICK HERE ›

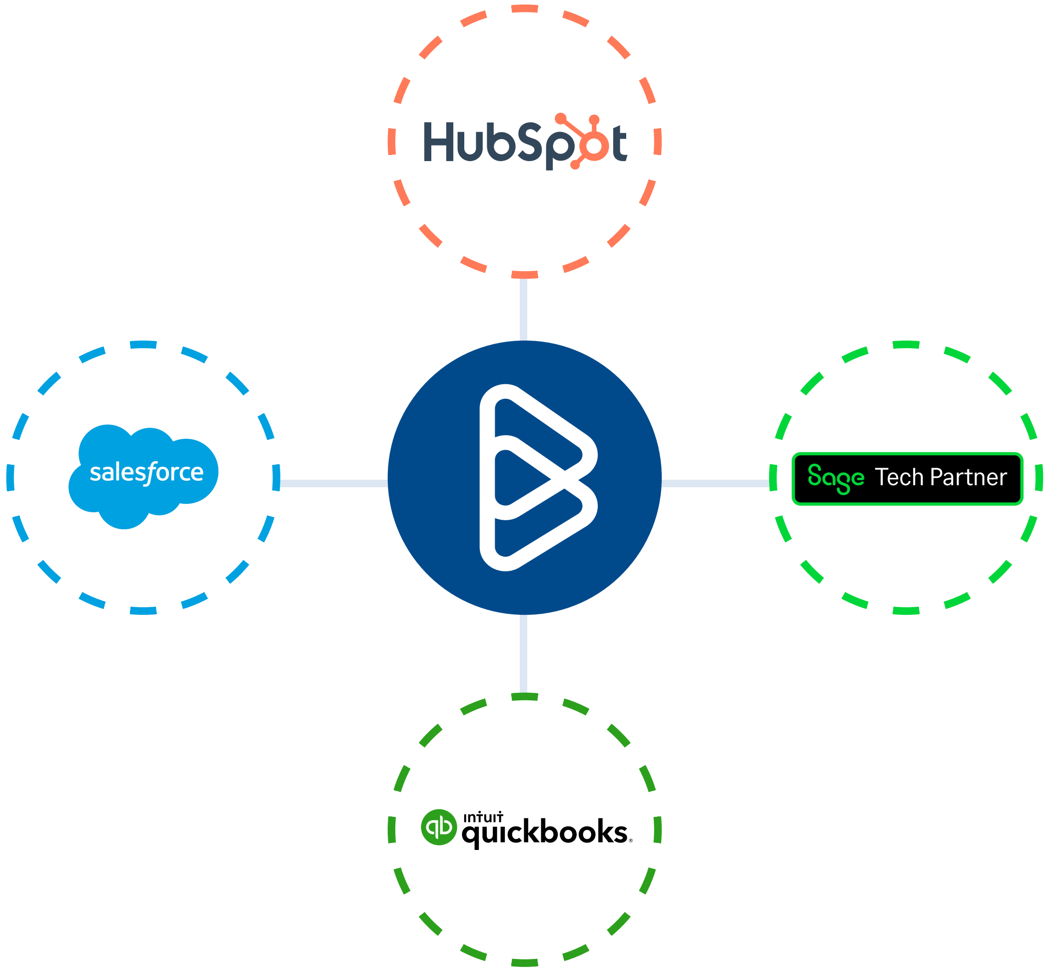
"We were using a combination of three different systems for time, accounting, and billing that we had to mesh together through uploads and reconciliations. With the Sage Intacct + BigTime integration, we brought all of our data into one consolidated platform, cutting our billing process in half."

KYLE MCDONALD,
Chief Financial Officer, Aegis Project Control

Connect BigTime With Your Existing Software Stack For Smarter Operations

BigTime takes the guesswork out of utilization, capacity planning, and project profitability.

Our award-winning PSA software provides project planning, budgeting, time- and expense-tracking, and invoicing, all backed by reporting and analytics.



Ready to get started? See what BigTime's integrations can do for your team

REQUEST A DEMO