



Infor ProServ Automation Suite

Optimize your margins and balance your resource utilization

Success for professional services firms lies in optimizing your margins and balancing your resource utilization with market demand. To ensure client satisfaction, while also meeting financial, strategic, and operational objectives, your 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 expense promptly and efficiently.
- Deliver seamless billing, revenue recognition, and margin analysis.

Track and manage your client projects

The Infor® Professional Services (ProServ) Automation Suite is a highly adaptable project portfolio management (PPM) solution for tracking and managing your client projects. From people and processes to the technologies and finances that fuel their efforts, the Infor ProServ Automation Suite is a robust and fully integrated time and expense management tool that bridges the work of client-facing project managers and internal accounting and operations managers.

Key benefits

- Project management
- Resource management and allocation
- Scheduling
- Budgeting
- Forecasting
- Work in progress (WIP) reporting
- Quantitative and qualitative project assessment

Drive client satisfaction and enhanced profitability

With the Infor ProServe Automation Suite, you get a powerful resource that you can use 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 from account management.

With the Infor ProServ Automation Suite, you can:

- Gain visibility and centralized control of all of your client activities, including all of your pending and in-progress projects.
- Manage opportunities and sales teams, while assessing and prioritizing your pipeline based on potential margin and strategic alignment.
- Optimize your resource allocations and commit to project timelines.
- Provide extensive reporting capabilities to keep business leaders and account managers informed.
- Improve your 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 your resources and business development efforts.

Achieve outstanding transparency and control

The Infor ProServ Automation Suite gives your 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. The Infor ProServ Automation Suite gives you these tools and functionality:

- Document templates to streamline your 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
- 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
- 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 your entire client project portfolio

With the Infor ProServ Automation Suite you get a flexible and highly efficient system for overseeing and optimizing your entire client project portfolio. By linking your critical project financial data to key accounting systems thanks to the Infor ProServ Automation Suite, you can ensure optimal margin management and information flow.

[Learn more about Infor Financial Management software >](#)



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