

DRIVING CONSULTANCY DECISIONS



DRIVING CONSULTANCY DECISIONS is at the heart of your business. Are there hidden patterns in your client and project types that would cause you to think twice about even taking on some jobs? How does everything pull together? How can you reduce nasty surprises? Do you have true visibility over the information you need to make the biggest decisions?



1 REVEALING UNSEEN BUSINESS PATTERNS

You don't need big data to uncover important information for your business. Your consultancy management system delivers it every day. Trends emerge over time, for example in types and sources of opportunities, or shifts in margins, or different client types affecting performance indicators, or the impact of different types of project on workloads, e.g. contracted resources. Or KPIs by team, or payment track records of different client types, or job health analysed in different ways...

- *"We also see patterns in the over-servicing now. For example, by client type. Very Useful."* Lisa McLaren, Director of Finance, Clickthrough.
- *"Getting Synergist gave us a surprise benefit: it shows us new ways to look at our data, uncovering trends, patterns and opportunities we had no visibility of before."* Kent Valentine, Director, Draw.



2 CONNECTING IT ALL TOGETHER

When we ask businesses to summarise what Synergist does for them, the most common response is that it pulls everything together.

- *"Before Synergist, we used several different systems. None of their elements talked to each other. It was at this point that we started to grow, and it became clear that complete visibility was needed. We needed far greater capture of everything that is going on. Therefore our vision became clearer: we needed to focus on key performance indicators, which relies on everything being connected, everything in one place."* Martyn Dyer, Financial Manager of a project-based business.
- *"Perhaps the single biggest benefit of all is the instant way we now get the overview of all the projects summarised together at any one time, showing values and work in progress."* Julie Cole, Financial Controller, EDP.
- *"It's all joined up now. It was fragmented before, and it took a long time to gather and compare and process that information. It's all in one place now, in front of you."* Steven Hunt, founder of consultant Steven A Hunt & Associates.



3 LIVE VISIBILITY

Synergist, in one word? Visibility.

- *"The best thing about Synergist is the visibility it brings. It shows where the costs are, where the profits are on individual projects, and where the losses are – all giving you time to do something about it."*
- *"It gives us great visibility of our clients, projects, estimating, everything. It gives us efficiencies. It reduces costs on jobs. And it gives us control. In a one-word summary, I would say it delivers Visibility."* Steve Laird, Finance Director of consultancy Online design & Engineering.
- *"We have much better visibility of our future revenues now."* Martin Dyer, Financial Manager.
- *"It's great to have complete visibility of every job, who's worked on it, what the estimate was, what the actual costs are, everything. You're then able to generate a report immediately."* Steve Lawrence, Operations Director, LHM.

DRIVING CONSULTANCY DECISIONS



4 REDUCING BAD SURPRISES

How on earth can you avoid bad surprises if you have no idea where they might be hiding?

- *"Clients subtly ask for amendments here and there, which used to get noddled through for free. But the extra work really mounts up. Our [previous] system didn't make it easy to track those changes, causing big problems. With Synergist I know what's going on in every job, and the great thing about it is that I know it as its happening. Costs are captured real-time. So there are no surprises."* Steven Clark, Financial & Commercial Manager, Tayburn.
- *"With Synergist, we can spot issues early. We use the key reports a great deal. It's essential in decision-making. We use Synergist's report alerts. For example, when estimated costs logged to a job reach 50% we see whether we are half way through completing the job. It flags up problems early. So when we get to 100% there aren't any surprises."* Steve Lawrence, Operations Director, LHM.



7 FIXING ISSUES EARLY

Synergist can be set to automatically trigger alerts on conditions that you choose. Some example alerts are when costs reach X% of the estimated budget on a job, or when jobs are late, timesheets overdue, or costs added to final-invoiced jobs. But the system also reveals other sorts of issues:

- *"Recently we hired a highly-paid contractor to do work that our data said should take three quarters of a day. He was actually taking two days. With Synergist this stands out. We can act before it's too late. We now see issues sooner and have the facts to back up the intuition."* Simon Butler, Co-Founder, Purestone.

6 GENERATING REPORTS QUICKLY AND EASILY

Reports: the window on your business...

- *"Before Synergist we used to spend hours and hours on producing reports."* Rob Hill, MD, HMA.
- *"We use the key reports a great deal. It's essential in decision-making."* Steve Lawrence, Director, LHM.
- *"We no longer have to rely on gut instinct and experience alone. It's there in black and white. Synergist gives me the reports I need."* Nigel Wilson, MD of a project-based business.

8 ENRICHING YOUR FUTURE COMPANY DECISIONS

How can a consultancy management system affect your business strategy and future?

- *"In creating our future, all the decisions of how to get there will come from Synergist."* Gareth Moore, Chief Operating Officer of a project-based company.
- *"Synergist is the fantastic backbone of our company."* Joseph Richardson, CEO.
- *"Synergist sits at the centre of everything we do, operationally and financially. Synergist provides one version of the truth, which enables the business to make informed decisions and accordingly make continual changes and improvements."* Steve Collins, Finance Director, Amaze.

5 MAXIMISING THE RESOURCES YOU HAVE

Joe Schmidt, head coach of the Irish rugby team, brought unprecedented success to the province and won them 4 trophies in his 3-year reign. He once said:

"I wouldn't even say I have a rugby philosophy. I just think that you try to maximise the resources you have currently available and the combinations that they form."

How does that thinking apply to consultancies? Here's one view:

- *"Synergist has streamlined our processes. Before, if we wanted to grow we would invest in extra people and hope that the turnover would increase by the percentage we needed."*
- *"It's all completely different now. Today, we're much better at seeing exactly what we can achieve from the resources we have."* Gareth Moore, Chief Operating Officer of a project-based company.

