CUSTOMER: **POLSOURCE.**

PolSource is a fast-growing Salesforce Platinum systems integrator with backing from Salesforce Venture. In addition to their Salesforce expertise, PolSource provide integrated consulting that solves many complex business challenges, delivering connected, strategic solutions to ensure successful transformations. PolSource don't just bring technology, but they also provide the ideas and support to build solutions that provides customers with the innovation, flexibility and accuracy needed to transform their business.

https://www.epam.com/about/who-we-are/partners/salesforce

"At Polsource, we've been growing rapidly. When you are a small company, you can get away with using spreadsheets and email for a while. However it was becoming prohibitively difcult to grow the business and to provide the type of business intelligence to scale and be successful."

BRANDON MARSEE.
SVP of Finance & Operations
POLSOURCE

PRE**CURSIVE**

HOW POLSOURCE **USES PRECURSIVE.**
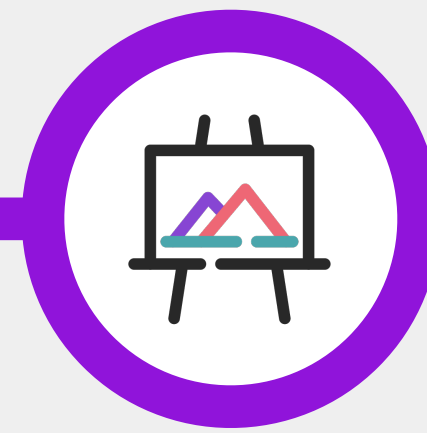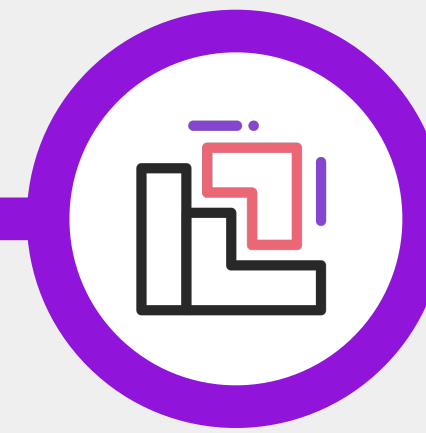
1. Resource Management
See where your staff are over or under-utilised. Plan ahead to avoid burnout.

2. Financial Forecasting
Revenue forecasts calculated automatically to see where you are.

3. Billing
Precursive makes it easy to manage services billing, raise invoices and get paid on-time.

4. Task Allocation
Break down a project or process and assign tasks to individual teams.

5. Project Management
Enhanced visibility and reporting across all projects in Precursive.

Key point: "With Precursive we were able to get ahead of capacity and resource requirements before they ever became unmanageable."

PRE**CURSIVE**

CUSTOMER **CHALLENGE.**

Planning and forecasting resource capacity was difficult; it time consuming to create reports on key operational metrics such as utilization, bill rates and revenue (forecast vs. actual). It took three weeks at the end of the month for financial and operational reconciliation.

They were also unable to quickly segment reporting or data to generate insights for the leadership team; despite 90% of costs being people, it was difcult to make adjustments based on good information. Wanted to reduce the amount of overage and associated revenue leakage on fixed price work.

THE **SOLUTION.**

salesforce
The World's #1 CRM

PRE**CURSIVE**
The Services Delivery Cloud for Salesforce

Opportunity Management

Quote Generation

Task Allocation

Project Management

Capacity Management

Services Billing

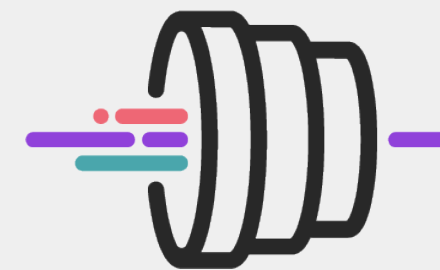Manage sales opportunities
Summarise pipeline for services
Align sales with staffing teams

Plan and staff projects with right team
Track performance of project costs and margin
Automated creation of project plans

Manage capacity & forecast hiring requirements
Monitor budgets and costs
Track time and billings with quick invoicing to customers

PRE**CURSIVE**

THE **SOLUTION.**

Polsource have been using Precursive for over 5 years to help the leadership team make better decisions using real-time data on utilization and sales pipeline. Precursive is the single source of truth for staffing, time tracking and revenue management.

salesforce

PRE**CURSIVE**

Sales   →   **Project Management**   →   **Task Allocation**
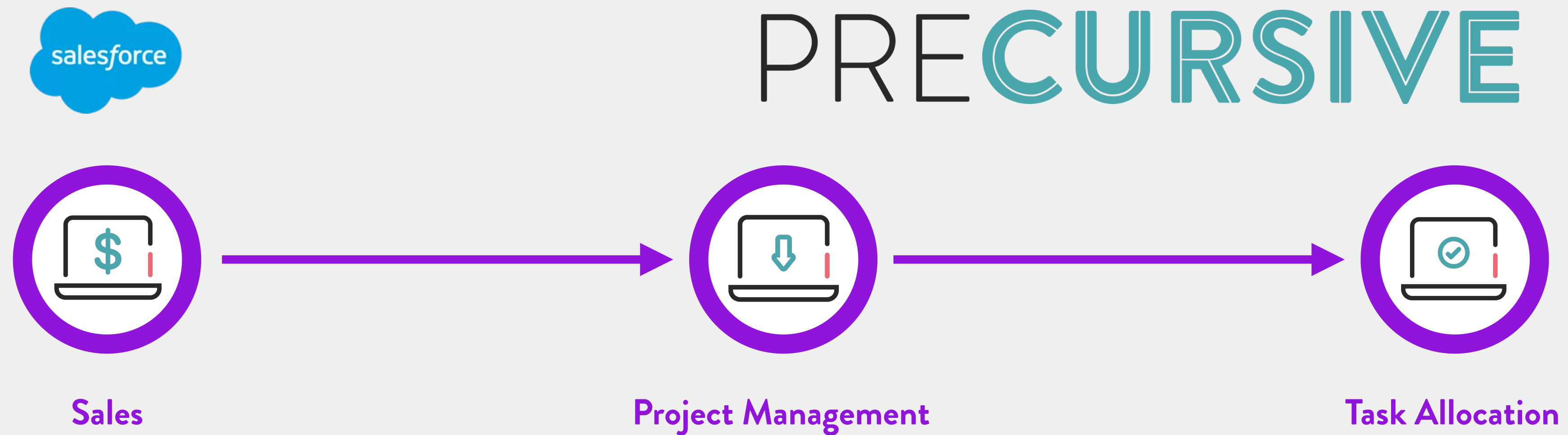
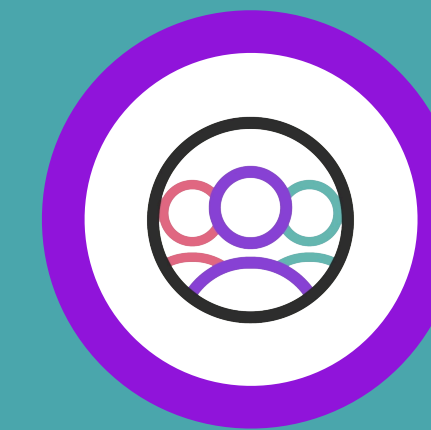# PRECURSIVE **SOLUTION.**

2 WEEKS.
Saved

A fortnight saved at the end of month with financial and operational reporting occurring faster, with real time reports.

TRUSTWORTHY.
Data

Management team can focus on solving the problem, rather than on trying to work out what the data is.

50%.
Reduction

Major reduction in time spent on non-billable work, allowing more time for more profitable tasks.

EMPOWERING SERVICES **TEAMS.**

CUSTOMER SUCCESS.

ENABLING OUTCOMES

Precursive team with enterprise experience at ABB, Fujitsu, Roche

LIGHTNING NATIVE.

TECHNICAL INNOVATION

> $1 Billion in project value managed in Precursive

ENTERPRISE SECURITY.

TRUST & PRIVACY

GDPR compliant
ISO 27001:
2013 certified

PRECURSIVE

★★★★★ 5.0
Average Rating

PRECURSIVE **CUSTOMER SNAPSHOT.**

High Tech.

Google · MHR · ALLOY · BetterCloud · GONG

Professional Services.

Challenger · torrent CONSULTING · Talentful · JACK MORTON · cts

PRECURSIVE

PRECURSIVE

THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

www.precursive.com