

Proximity gains proactive resource management for its booming consulting business

PROXIMITY

Industry: Professional Services

Company Size: Small

Headquarters: Canberra, Australia

Products Used:

Professional Services Cloud,
ERP Cloud

Key benefits:

- ✔ Real-time visibility
- ✔ Empowered to smoothly scale to an 80% increase in projects and beyond
- ✔ Achieved 75%+ reduction in invoicing time



“The combination of Salesforce and FinancialForce gives us everything we need for managing our customer relationships, projects, and accounting. This end-to-end solution is just what our business needs to continue on its growth path.”

Daniel Cox
Group Manager - Technology
Proximity

Proximity is a leading provider of integrated consulting, legal and commercial services to government and large organizations. Calling upon a multidisciplinary approach and niche expertise, the company collaborates with its clients to produce extraordinary and impactful solutions.

Outgrowing Software

Proximity has achieved ~30% revenue growth year over year. Having standardized on Microsoft 365 to run much of its business, the company used Microsoft SharePoint to manage projects. That worked when the company was smaller, but as they grew the project volume jumped to over 100 concurrently active projects. Proximity pushed SharePoint to its limits. Increasingly, the software didn't function as needed. Making matters worse was a disconnected finance process. Lack of integration between SharePoint and the MYOB accounting package forced the finance team to manually transfer data and then fix data-entry errors every month for invoicing – a process that took a week and a half.

In line with its move to the Salesforce platform, Proximity chose FinancialForce Professional Services (PS) Cloud and FinancialForce ERP Cloud for the scale and functionality its business needed.

Simplifying core processes

Numerous areas of Proximity's business benefit from best-of-breed FinancialForce solutions. FinancialForce PS Cloud sends reminders to client services to enter their time and provides greater visibility into their projects. The client engagement team now relies on a system that caters to all their project-related needs, while project managers get real-time access to all project information, including status and financials.



Reducing busywork

Because of simple time and expense entry – which can even be done on a mobile phone – Proximity's consultants don't get bogged down with tedious tasks. At the same time, seamless connection between PS Cloud and finance software eliminates manual data transfer and the resulting errors and inconsistencies. Rather than spend a week or more producing month-end invoices, the finance team handles it with the click of a button.



Shifting from reactive to proactive

Empowered with purpose-built professional services software, Proximity can proactively manage its projects and needed resources. It is taking advantage of mapping resource requests with available consultants with the right skills. At the same time, the executive team is now able to look beyond historical data to forecast trends and identify growth opportunities.

✓ Ready to Staff Hold Tentative Assign										
Details Resources Skills & Certifications Project Task Assignments Est Vs Actuals										
<input type="button" value="Pin"/> <input type="button" value="Compare"/> <input type="button" value="Manage Schedule"/> <input type="button" value="Hold"/> <input type="button" value="Assign"/>										
Name	Status	% Availab...	Rank	Resource ...	Region	Practice	% Utilizat...	Mailing City	Default C...	
<input type="radio"/> Tim Marklein		59	1	Consultant			85.00	Portland	USD 85.0	
<input type="radio"/> Preston Mayo		91	2	Consultant			85.00	Oakland	USD 85.0	
<input type="radio"/> Samantha Lewis		6	3	Consultant			85.00	San Mateo	USD 85.0	
<input type="radio"/> Doug Douglas		5	4	Consultant			95.00	New York	USD 95.0	
<input type="radio"/> Lisa Medley		81	5	Consultant			85.00	Seattle	USD 100.0	
<input type="radio"/> Pam Practice		71	6	Consultant			95.00	Tampa	USD 75.0	
<input type="radio"/> Jim Hilligoss		79	7	Consultant			85.00	San Mateo	USD 85.0	
<input type="radio"/> Ed Smith		9	8	Consultant			85.00	London	GBP 95.0	
<input type="radio"/> Anne Brogan		4	9	Consultant			95.00	Manchester	GBP 125.0	
<input type="radio"/> Brad Tan		-33	10	Consultant			85.00	Sydney	AUD 65.0	
<input type="radio"/> Pjotter Pitka		50	11	Consultant			85.00	Rotterdam	EUR 140.0	
<input type="radio"/> Ahmet Arva		50	12	Consultant			85.00	London	GBP 110.0	

Continuously improving business

In addition to improving business processes, Proximity is harnessing FinancialForce software to improve its business culture. Building on uninterrupted business during the successful launch of FinancialForce, the company keeps unlocking features that enable it to realize incremental improvements. Rather than waste time fixing a core system, they can focus on extending the capabilities of a powerful platform that addresses all their needs.

Learn more

www.financialforce.com