

Professional Services

ERP Advisors Group (EAG) is one of the top independent enterprise software advisory firms for Professional Services.

Some professional services firms need to automate manual processes for tracking time and expenses, while others need to automate the entire project lifecycle, including resource management, detailed task tracking, and intricate costing and profitability reporting. ERP Advisors Group can help your firm plan what you need so you purchase the right software without buying modules you don't need.



Practical Deliverables

ERP Advisors Group will help your Professional Services business define requirements, set your software strategy, provide a roadmap, conduct a diligent vendor selection process, and manage the entire implementation.

■ Develop Your Professional Services ERP Strategy

We will define your needs and wants as well as how you would ideally use new automated solutions across your Professional Services company, whether you are an engineering, consulting, inspecting, architecture, accounting, financial advising, or other time and expense-based services provider.

■ **Choosing an ERP for Professional Services** We will guide you through selecting the best fit, most cost-effective business applications, and implementation partners.

■ **Implementation Project Management** After finalizing your Professional Services ERP software and services contracts, EAG stays with you to oversee your implementation until you successfully go live. We will oversee integrations, data migration, change management, budgets, design and configuration, walkthroughs, training, testing, and go-live cutover and will provide executive and project sponsor support throughout the duration of your project.

■ **Data Migration** We assist with all components of data migration: extraction, cleansing, transformation, and loading into your new system to ensure you have complete confidence in the accuracy of your data at go live.

[...]Our experience was a positive one. The initial calls with Shawn and Erica were very strong. They really set the tone about the strengths of their organization. They demonstrated from the beginning that this was an organization interested in partnering with us, as opposed to just closing a deal.

Theresa Carey, CFO
Froehling & Robertson



Why Professional Services Companies Upgrade Their ERP Software

Surveys across all of our Professional Services clients reveal the most common reasons why they need new ERP to automate their business:

- Little to no ability to systematically manage projects in your current system.
- No expense management application causing copious amounts of time manually tracking expenses, approvals, and related support documentation.
- Time entry is not user-friendly or intuitive requiring repetitive entry of project attributes and lacking defaults.
- Unable to see the availability of resources when staffing for projects.
- Time Tracking is kept in multiple systems that are not integrated.
- Unable to report on KPIs and other management requests without significant manual research and work.
- System currently doesn't allow for tracking of non-billable hours.
- No clear view of enterprise-wide customer data and touchpoints.
- No systematic way of quickly, efficiently, or automatically creating quality financial reports in the software.
- Manual intervention makes it very time-consuming, difficult, or completely impossible to provide timely responses to client information requests.



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I felt their documentation and communication was good. Their whole team seemed well organized, and they took the time to set up routine meetings, taking into account that everyone was busy, and that was helpful in keeping things on schedule. They were also accommodating to our schedules knowing we were trying to get half a dozen people together for mini demos.

Zan Murray, Executive VP
J-U-B Engineers



Professional Services ERP Vendors

ERP Advisors Group will help you not only define your requirements but more importantly, we will bake in the best practices for your Professional Services company into your Request for Information and Demonstration Script.

We conduct dozens of selections every year, equating to tens of millions of dollars in software and services sales. With our deep knowledge of Professional Services ERP, we will help you find the right ERP for your company, AND the right company to implement it.

We regularly vet the top, most viable Professional Services ERP systems.