

CASE STUDY

Prairie Capital Advisors
integrates KeyedIn Projects
with Sage Intacct and
Salesforce to provide a
complete, bid-to-bill solution

Prairie Capital and PSA

Prairie Capital Advisors, a professional services organization incorporated in 1996, began their professional services automation (PSA) search to accomplish three primary objectives:

- Enhanced project management functionality and fiscal visibility
- Automated time and expense tracking
- PSA integrated with cloud-based financial/professional accounting solution (Sage Intacct) and Salesforce CRM, for an optimally scaled service-delivery solution

Business Challenges

By 2013, the company workload and headcount both had expanded 50%; totaling 30 resources utilized throughout Prairie Capital's five US offices.

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Vincent DiRaddo
Director of Finance
& Administration

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Initially, Prairie Capital consulting and support staff utilized Excel spreadsheets and QuickBooks for time and expenses submission, invoicing and billing. To simplify the company's financial processes, they moved to Sage Intacct, a cloud-based financial management solution, for its real-time automation and multi-ledger accounting capabilities. The company was also utilizing another cloud-based solution, Salesforce, as their CRM. The final function needed was the ability to schedule, review and optimize utilization of their billable resources to reach profitability goals.

Vincent DiRaddo, Director of Finance & Administration for Prairie Capital, appreciated the real-time visibility and third-party systems integration capabilities provided by cloud-based solutions, and sought a PSA component to complete the firm's integrated service-delivery system, which would provide improved visibility into project management, resource allocation and overall profitability.

“Our rapid growth taxed our infrastructure. We were proponents of cloud-based systems, as they ease integrations amongst best-of-breed programs of each category, and enabled us to create a tailored solution,” stated DiRaddo.

After thorough evaluation of six PSA products, Prairie Capital selected KeyedIn Projects for the solution's ability to meet their project planning and real-time visibility needs, as well as integrations with both Sage Intacct and Salesforce.

KeyedIn Project's consultancy-led implementation and ongoing cloud-based system fit the firm's specific organizational environment. "Being a seamlessly integrated Sage Intacct-recommended solution, that also supports Salesforce, had KeyedIn Projects well-suited for us," confirmed DiRaddo.

"Additionally, KeyedIn Projects provides historical information that will be beneficial when planning subsequent projects and responding to RFP's. All documented details of past projects will remain available to us, as they're needed. That unto itself is a major profitability contributor."

Vincent DiRaddo
Director of Finance
& Administration



KeyedIn Projects' Impact

During the evaluation discussions between Prairie Capital and KeyedIn, visibility of projects was of primary focus. Expansion beyond time and expense tracking was needed. With the increased project workload, resources were stretched thin, meaning optimizing consultant's billable hours became an ongoing priority, as did focused profit analysis per project. Organization-wide visibility and reporting of all current and planned projects provided real time information to drive educated decisions.

"Our substantial growth posed operational challenges that we believed cloud-based automation could overcome. Significant to our success has been having our most capable consultant's expertise on corresponding client projects. We needed to prevent resource bottlenecks, and have the ability to track project progression and financial status in real-time," emphasized DiRaddo.

"KeyedIn Projects provided this critical step between opportunities found in Salesforce and the financial functions of Sage Intacct. Seamless integration of these solutions enabled us to build a best-of-breed solution scaled to our exact needs. Having complete visibility and detailed analysis throughout each project provided accurate status reporting, along with improved collaboration, which led to optimized profitability.

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About KeyedIn Projects

KeyedIn enables your PSO to be more strategic, more efficient, and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic PS analytics.

Visit www.keyedin.com to learn more.

About Prairie Capital

Prairie provides investment banking, ESOP advisory and valuation advisory services to support the growth and ownership transition strategies of middle-market companies, helping business owners understand, evaluate and implement ownership transition strategies of a wide variety of types and over varying timelines.

www.prairiecap.com



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