

AIM implements Dynamics CRM to increase employee's productivity & help them enhance their skills

Highlights

- AIM Software 'AIM' is a boutique and niche software development and services company based out of Vienna, Austria
- AIM provides Business Applications with a modern data management platform ("GAIN") to more than 100 of the world's leading asset management, private banking and wealth management firms
- 'AIM' have around 125 employees, serving customers across the globe with major focus in Europe, USA and UAE

"AIM was encouraged by the experience that Alletec contributed to these initial conversations which did a lot to shape 'AIM' CRM strategy. Alletec also helped 'AIM' in defining future roadmap of the CRM"

Executive Summary

'AIM' was using a home-grown SharePoint based timesheet system. MS Excel was being used for managing resource allocation, project budgeting and an isolated local ERP was used for financial accounting.

'AIM' had Dynamics CRM for Sales but had no integration with other systems. AIM wanted to replace all these disparate systems with a single integrated solution. Since they were already using Dynamics 365 Sales, they wanted to implement Dynamics 365 PSA for project and timesheet management.

The Challenges

- Time sheet data was being manually compiled for invoicing to customers, leading to compliance issues
- Existing systems didn't have any method to control manual corrections while posting time to the projects
- Resource availability, allocation & skill management were being done manually and changes were not controlled against the budgets
- Month end closing activity was performed manually in excel sheets which was time consuming and prone to error
- Error/ delayed invoicing was common and a reason of conflict between sales, delivery and accounting teams
- Generation of reports and MIS required a lot of manual effort and was time taking

Better
visibility into
project KPIs

Enhanced
Employee
Productivity

Improved
Process
Compliance

Faster
Decision
Making

The Solution

- Alletec implemented a fully integrated Dynamics 365 PSA with NAV 2017 on Azure and moved entire reporting, analytics and dashboards to Power BI
- Solution was mobile enabled with dashboards and processes for stakeholders to collaborate better and being on cloud meant able to work from anywhere
- Revenue recognition for various type of projects like Time and Material, Fixed Price, Fixed Monthly, etc. is computed and posted automatically.
- Month end closing can now happen in few hours
- Opportunity management cycle, advance information provided to delivery team for resource planning and mobilization
- Deal review process now ensures better legally compliant proposals

The Benefits

- Engaged Employees are more productive as they can now find the projects related information in few clicks
- Early visibility helps better resource planning and mobilization
- Dashboards & KPIs help your team stay focused
- Integrated finance leads to better profitability and cash flow
- Quickly identify employees who need to update certifications or acquire new ones
- Accurately measure resource utilization on real-time
- Make intelligent decisions to get the most out of billable resources

"Alletec understood our challenges and partnered with us to figure out how to achieve our goals. Alletec implemented an integrated Dynamics 365 PSA module enabling us to efficiently manage project lifecycle which in turn helped us improve employee productivity, provided better visibility to take informed decisions and deliver a seamless experience to our customers"

Sushil Sharma
Manager - AIM Software

AIM



BUSINESS APPLICATIONS FOR DIGITAL TRANSFORMATION

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