

HAL WEINBERGER CONSULTING

Solution Overview

Industry

Services
Project Series

Scenario

Experiencing rapid growth, Hal Weinberger Consulting realized they needed a solution that would make project-tracking processes more efficient and billing, a quick and easy process allowing them to strengthen their entire organization.

Company Profile

Based in Chicago, IL, Hal Weinberger Consulting is a professional service organization specializing in software reselling, consulting and support.

Situation

Dynamics Project Series has simplified the administrative tasks involved in running a fast-paced software consulting organization.

Software Used

Microsoft Great Plains Dynamics
General Ledger
Receivables Management
Payables Management
Bank Reconciliation
Project Accounting
Personal Data Keeper
Crystal Reports
FRx Report Writer

Operating System

Microsoft Windows NT 4.0
Microsoft Windows '98
Macintosh

Based in Chicago, IL, USA, Hal Weinberger Consulting was founded in 1987 as a software reseller, consulting and support organization. With consultants working in many locations, time and expense reports were a time-consuming, manual task that exchanged hands multiple times, often causing inaccuracies. Hal Weinberger Consulting has experienced incredible timesavings since they began using the Project Series over a year ago. According to Hammer, they realized a return on their investment within three months of implementing the solution.

When the growth and pace of the professional services industry made Hal Weinberger Consulting realize they needed to accurately track projects and improve their professional image, they turned to Dynamics Project Series to strengthen their organization.

Business Issues:

- Accurate time and expense information
- Better time management
- Faster collection on customer invoices
- Reward consultants for services

Microsoft Great Plains Answers:

- Any time, anywhere time and expense entry
- One-time data entry with seamless integration
- Customized invoices and time-saving billing cycles
- In-depth reporting and inquiries by project manager

Professional Services businesses know the challenges of tracking and billing time and materials invested across multiple client projects. Hal Weinberger Consulting's service business was growing with limited resources and time. When they needed a solution that would make project-tracking processes more efficient and billing, a quick and easy process, they turned to Dynamics Project Series.

Carol Hammer, Partner, Hal Weinberger Consulting explained that information was entered in to three different systems for accounting, expense tracking and reporting purposes.

The hours this multiple entry and approval process took began to affect the company's bottom line. According to Hammer, "Bills weren't mailed to customers for over a month after the services were performed, inevitably affecting revenue."

“Since we implemented Dynamics Project Series over a year ago, we’ve been able to focus our time on running our business. Project Series completely takes care of managing project time and expenses, making the billing process effortless while presenting a more professional image to our clients.”

Hal Weinberger,
Owner
Hal Weinberger Consulting LLC

Worse yet, the tight labor market was beginning to affect Hal Wienberger Consulting’s business. To reward and retain their consultants, the company created a bonus program based on billable and non-billable time. To successfully execute the plan, Hal Weinberger Consulting had to track and report time by consultant. Their current time tracking records, customer invoices, were falling short of meeting their changing needs.

Need to Streamline Data Collection

No longer could Hal Weinberger Consulting afford the time it took to track and bill their projects. “Data collection had to be streamlined,” noted Hammer. “And, we needed to pull reports from that information, and trust the data to be accurate across the organization.” Project Series seamlessly integrated with their financial management system Dynamics; hence real-time reports and extra time for other business activities became a reality.

The ability for the solution to grow with the organization was an issue, and they soon realized that the Project Series’ tracking, billing, and reporting functionality would meet the growing needs of their organization. Cost categories were set up to support the way Hal Weinberger tracked costs, invoices were customized per customer, and general utilization reports that had been cumbersome in earlier-used spreadsheet and word-processing applications were created based on their internal information needs.

Finally, the virtual needs of their consulting business were met head-on with the Project Series employee time and expense application, Personal Data Keeper. Hal Weinberger consultants needed security and flexibility, as Hammer states, “Personal Data Keeper has been set up on each consultant’s laptop computer and on a number of central PC’s in the office to allow employee’s to submit time and expenses when it is most convenient for them.”

Hal Weinberger Consulting has experienced incredible timesavings since they began using the Project Series over a year ago. According to Hammer, they realized a return on their investment within three months of implementing the solution. In addition, Hal Weinberger Consulting has experienced additional benefits that include:

- **Streamlined information entry** – A one-time entry of time and expenses allows for quicker and more accurate dissemination of information to the General Ledger, billing and purchasing components.
- **Quicker access to customized information** - Getting information out of the system is as simple as selecting a customized report that provides information Hal Weinberger Consulting needs to efficiently run their business. For a quick summary of projects in progress, project managers can select the project inquiry screen and view actual line item expenses against the project.
- **Time and expense reporting made easy and accurate** – Consultants now have a more efficient, easier method for submitting their time and expenses against projects. Rather than submitting slips of paper that must be rekeyed, they conveniently complete time and expense reports within the Personal Data Keeper from any location, making the process simple, accurate and professional.

- **Reduced approval time** - The multi-level approval system provides Hal Weinberger Consulting a quick, accurate method of approving employee time and expenses. According to Hammer, "With the Project Series, we've cut our approval time in half. What used take us a week per month, now takes us two days, allowing Hal and myself more time for strategic actions."
- **Quicker Payment Turnaround** – By providing customers a professional, customized invoice, they better understand billable and no-charge services provided by Hal Weinberger Consulting, speeding payment. States Hammer, "The billing feature allows us to provide our customers a professional invoice customized to their needs. As a result, our customers better understand the fees involved with our services, and we see quicker turnaround in payment from them."

More than anything, the Project Series has simplified the administrative tasks involved in running a fast-paced software consulting organization. According to Hal Weinberger, owner of Hal Weinberger Consulting, "Since we implemented Dynamics Project Series over a year ago, we've been able to focus our time on running our business. Project Series completely takes care of managing project time and expenses, making the billing process effortless while presenting a more professional image to our clients."

An additional benefit has come in the way of new business opportunities. Dynamics Project Series has expanded Hal Weinberger Consulting's business into new markets. Primarily serving the professional services market, they've seen the need for the Project Series in their clients' businesses, making it a great business opportunity for new sales, consulting and support services. "The hands-on knowledge we gain from using the Project Series allows us to answer both existing and potential clients' questions on project accounting from experience," claims Hammer. "The high quality of the product, proven support of Microsoft Great Plains, and market demand for project accounting are building blocks we can grow our business on for the long-term."

For more information about Microsoft Great Plains Business Solutions, visit www.greatplains.com

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