

# Zavanti for Professional Services

## Transform your business processes

Zavanti for Professional Services gives organisations utilising valuable human resources and skills competitive advantage by better managing resource allocation, project schedules, costs and profitability. The solution facilitates every step in a professional business cycle, starting with the qualification of leads at the beginning of the sales process, continuing through the pipeline management of opportunities and then the creation and ongoing successful management of projects. Linking directly to Zavanti ERP for full financial management.

By using pre-defined templates, projects can be easily created, with structured deliverables and timeframes. Available resources can be appropriately allocated to these deliverables as necessary and the project managed carefully to completion. The solution incorporates dynamic dashboards and reports that provide comprehensive metrics on sales, projects, resources, cash flow and business profitability. Zavanti Professional Services is built on the Microsoft Dynamics CRM 365 platform and a cloud-based deployment, with integrated financials available.

## System Overview

- Dynamic dashboards provide a sales snapshot at a glance
- Manage the entire Sales and Project Delivery Process in an intuitive way
- Capture leads for your professional services from any source
- Qualify those leads into opportunities using a structured qualification survey
- Create templates for your common project types allowing for quick and easy project set up
- Create project estimates
- Include external contractors, fixed costs and external equipment and services in your estimates
- Customise the sales process and automate it with workflows
- Manage your professional services projects through to completion and analysis of profitability
- Multi company and multi project
- Produce Status Reports, Gantt charts
- Manage your resources and their allocation
- Timesheet entry
- Outlook integration
- Full financials for accounting and tax
- Cash and accrual based reporting

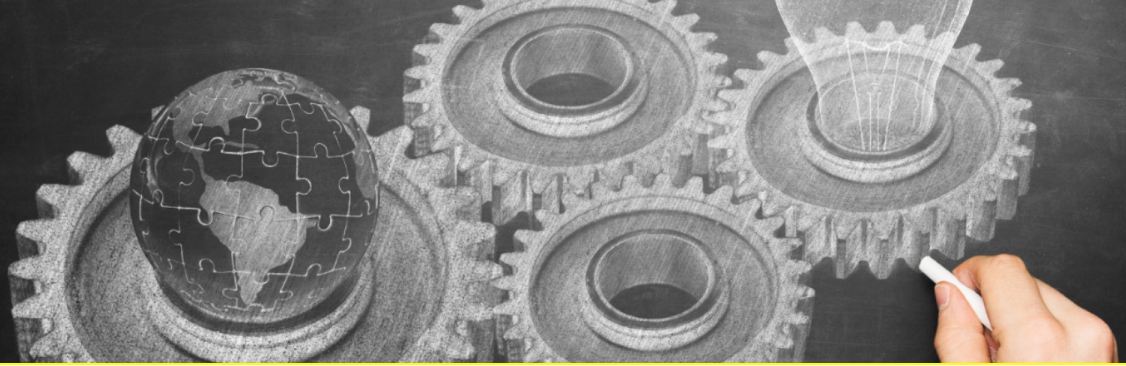
## Contact

### Australia

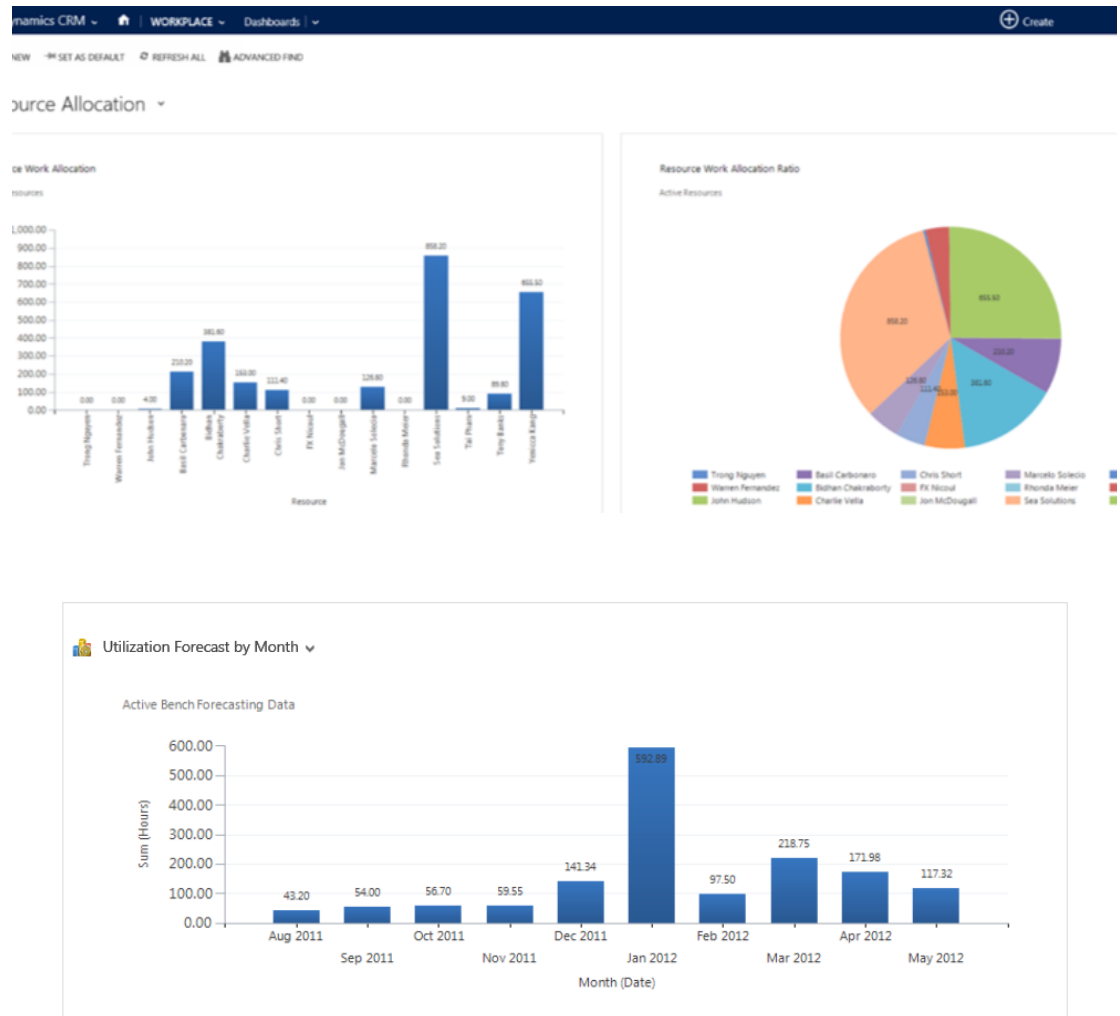
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## See the system



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## About Zavanti

With a head office in Sydney, NSW and staff around Australia and in the USA, Zavanti has been providing leading edge software and support for real estate and property industry and associated professional services and support for over 30 years.

### Products and services

- ERP: Our powerful finance system designed for real estate and property industries
- Feasibility software: For property development analysis
- CRM—Advanced customer management solutions

## Solution Overview

Feasibility, CRM & ERP.



Contact [sales@zavanti.com](mailto:sales@zavanti.com) for an obligation-free demonstration