



# Zavanti for Professional Services

## Transform your business processes



Competitive advantage through advanced resource allocation management, project schedules, cost & profitability



Qualification of leads, pipeline management of opportunities, creation & ongoing successful management of projects



Direct link to Zavanti ERP for full financial management



Creation of projects with structured deliverables & timeframes; easy allocation of resources and complete project management abilities



Dynamic dashboards & reports → comprehensive metrics on sales, projects, resources, cash flow & business profitability



Built on Microsoft Dynamics CRM 365 → is a cloud-based deployment with integrated financials available

## System Overview

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

## Contact

### Australia

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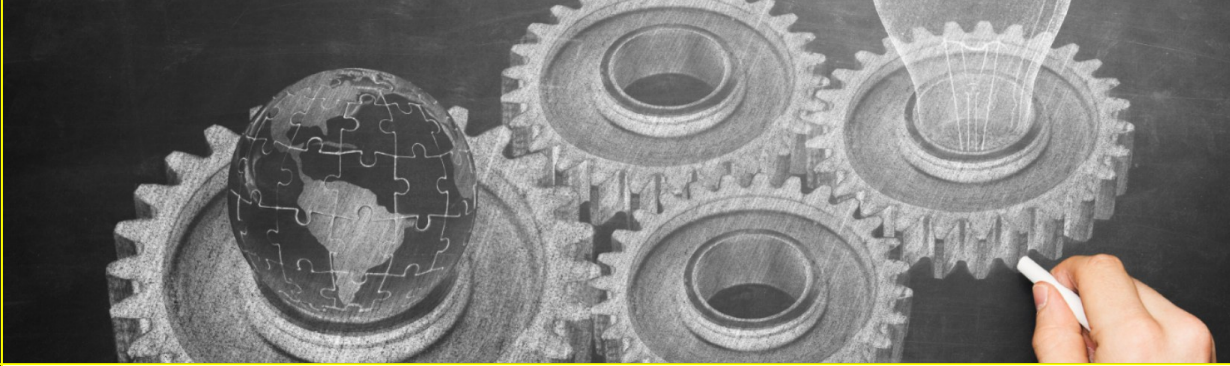
### North America

T: +1 951 454 1881  
A: Chino, CA

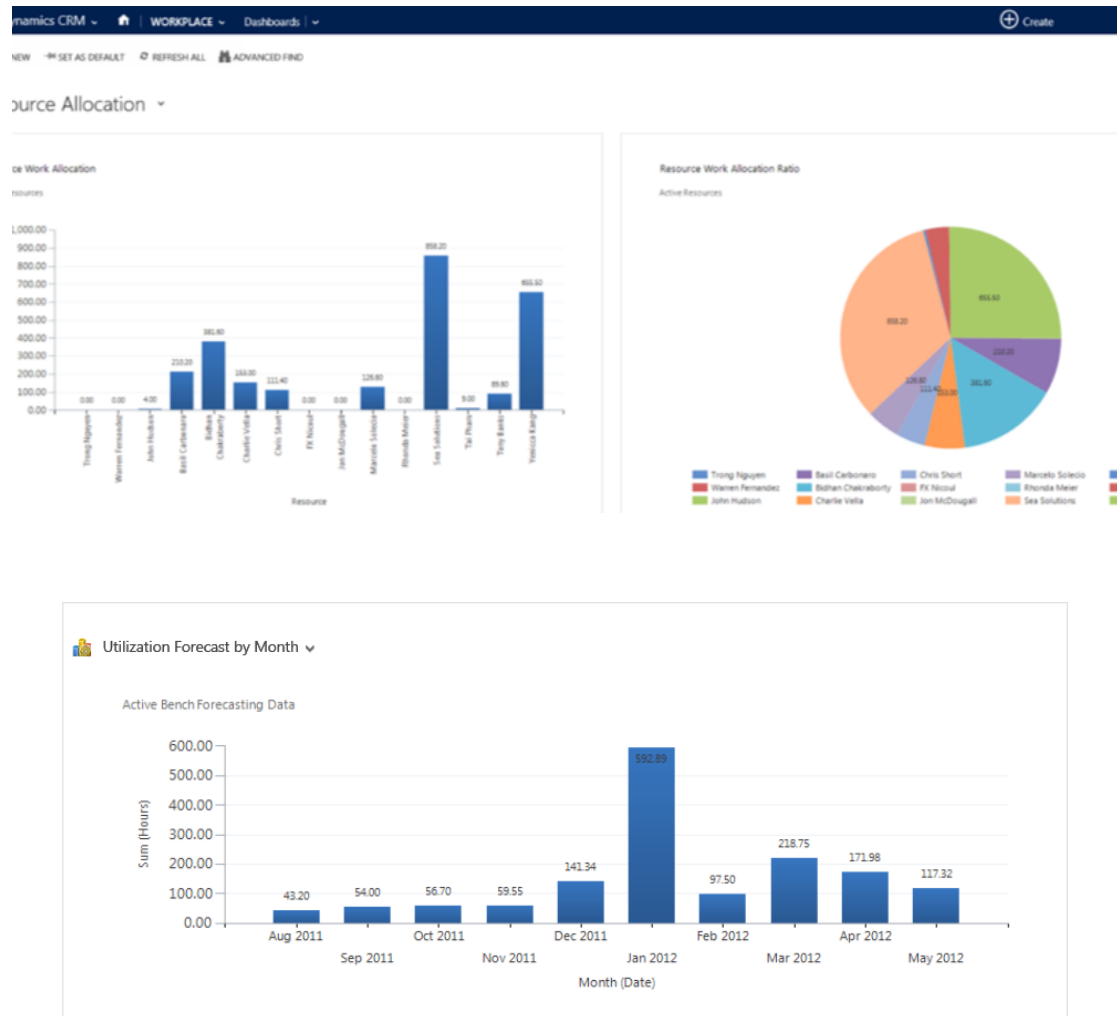
### New Zealand

T: +64 27 446 0047  
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## See the system



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## About Zavanti

With a head office in Sydney, NSW and staff around Australia, NZ and in the USA, Zavanti has been providing leading-edge software and support for the real estate & property industries. Zavanti has offered 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 sales, marketing and customer management solutions

### Solution Overview

Feasibility, CRM & ERP.



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

