



ProductDossier[®]

Project Management First

TouchBase

Opportunity-to-CASH



Organizational Growth Levers

The growth levers for any business consist of Customers, Workforce, Operations, and Financials. Within financials, it could be profitability, cash flow, revenue per 'economic driver,' etc.

Business leaders look to the Revenue-Based/External Customer projects (popularly known as Professional Services) for fortifying the company's economic pillar.

Focus Areas

Pre-Sales

- Pursue 'right' opportunities
- Proposals must be profitable.
- Collaborate with project delivery teams.

Project Planning & Execution

- Meticulous planning.
- Flawless execution.
- Guardrail project profitability.

Professional Services Challenges



Challenge

Fallout

Inefficient & sloppy estimation

Inaccurate proposal estimates

Unstructured proposals

Lack of proposal rigor

Siloed project management

Flawed project delivery

Inaccurate revenue recognition

Lower project profitability

Revenue leakage

Reduced profit and cashflow

Scattered project documentation

Questionable data integrity

Poor Stakeholder collaboration

Project conflicts

Disparate systems

Multiple sources of project truth

TouchBase

Foundational Capabilities

- Configure and templatize to your standards, processes, workflows, templates, and checklists
 - Industry-specific
 - Product-specific
 - Organization-specific
- Complete digitization
- Best-in-class User Interface & User Experience
- Analytics, Dashboards, Alerts, and Notifications



Pre-Sales

- Leads & Opportunities
- Estimates
- Proposal Builder
- PO/Contract Creation: Fixed Price, T&M, Cost Plus
- Multiple POs to One Project; One PO to Multiple Projects etc.

1

Project Initiation

- Revenue Plan
- Develop Budgets (Resources, Material & Overheads)
- Financial Milestones & Cash Flow Analysis
- Resource Request

2

Project Planning

- WBS
- Schedule, Critical Path Analysis & Baseline
- Methodologies: Agile, Predictive, Hybrid.
- Resource Allocation & Utilization
- Quality
- Knowledge Mgt.
- Procurement
- Risk Identification & Response Plans
- Meetings & Minutes

3

Execute & Control

- Technical Reviews & Defects
- Baseline Revisions & Comparison
- Project Progress
- Comprehensive Documentation
- Vendor Payments
- Customer Receipts
- Timesheets & Expenses
- Dashboards & Forecasts
- Regulatory Compliance

4

Closure

- Acceptance Documentation
- Customer Invoicing
- Lessons Learned
- Project Archival
- Customer Satisfaction

5

TouchBase Integrations



ORACLE



TouchBase Impact



Automated & accurate revenue recognition.



Zero revenue leakage



Enhanced economic value



Optimize resource utilization.



Enhanced project efficiency & productivity



Flawless planning



Real-time internal & external stakeholder collaboration.



100% digitized project management

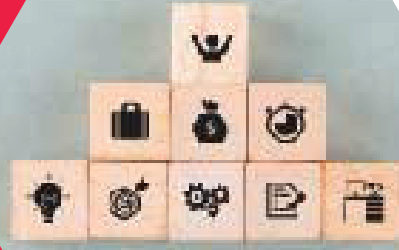


Single version of projects truth.



Pursue 1.5x to 2x opportunities.

TouchBase Modules



New Product Development



Project Management



Project Financials Management



Opportunity Management



Project Resources Management



Project Procurement



Timesheets & Leave Management



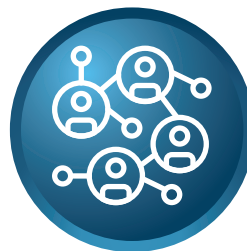
Documentation



Project Quality



Utilities



Social Collaboration



**We are ready to
build a project
management culture
for your enterprise.
Are you?**



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