



PRECURSIVE CASE STUDY.

CUSTOMER - P3 ADAPTIVE
AI CONSULTING FIRM

PRECURSIVE

PLAN. TRACK. FORECAST.



CUSTOMER: **P3 ADAPTIVE.**

P3 Adaptive is a Power BI consultancy that delivers services and consultancy to firms who want to unlock the potential in their data. P3 makes transformative data solutions accessible to businesses with limited resources. Their project delivery methodology calls for their skilled team to work in perfect synch with their client and with each other, meaning efficient and intelligent resourcing is critical to maintaining their business model.

Matching the supply & demand of services. Precursive RCO has been pivotal in powering up P3's operation, allowing the team to maximise their capacity.

<https://powerpivotpro.com/>

PRECURSIVE

“Precursive helps me get more sleep. Previously we were just playing the game when a big deal came in, it was like Tetris, trying to fit the oddly shaped work into people's schedules. Now we're able to accurately answer those questions which is huge for us in meeting customer expectations during the sales process.”

RYAN SULLIVAN.

Vice President

P3

HOW P3 ADAPTIVE **USES PRECURSIVE.**



1.

Capacity Planner

Ensures that time available is fully utilized for maximum efficiency and productivity.



2.

Financial Forecasting

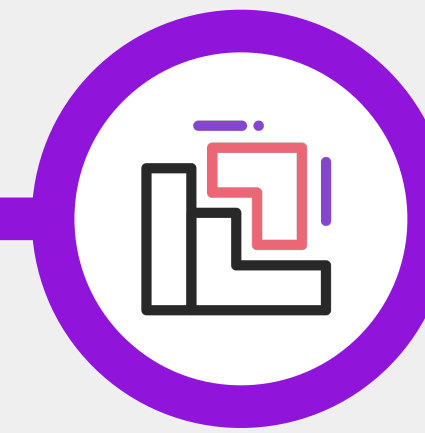
Revenue forecasts calculated automatically to see where you are.



3.

Billing

Precursive makes it easy to manage services billing, raise invoices and get paid on-time.



4.

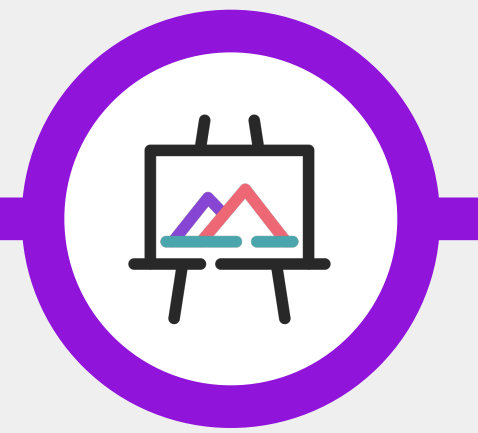
Task Allocation

Break down a project or process and assign tasks to individual teams.

5.

Tracking KPIs

Utilization & capacity
Time to launch
Time spent by product.



Key point: “We want to see what our bookings would be in terms of billing back to the client. I want to compare our forecast to actual.”

CUSTOMER **CHALLENGE.**

“I was trying to get more sleep!”

“It was 4 am nights for a week, just playing the game when a big deal came in. We called it playing Tetris of trying to fit oddly shaped work into people's schedules.”

P3 had a proprietary solution in place that swallowed up a lot of manual hours. Capacity planning was one of the key areas P3 were looking to improve. They faced a number of key challenges when it came to their old system, take a look below:

- No ability to forecast capacity
- Wanted better approach to project based costing
- Manual approach to financial reporting and KPIs



THE SOLUTION.



The World's
#1 CRM

PRECURSIVE

The Services Delivery
Cloud for Salesforce

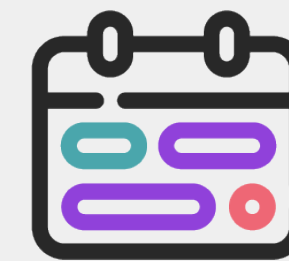


Opportunity
Management

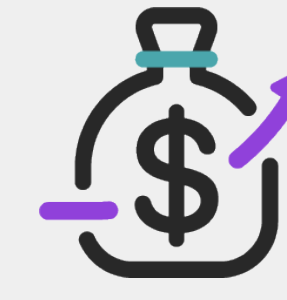


CRM
System

Account & opportunity management
Custom workflow automation
Reporting & analytics



Capacity
Planning

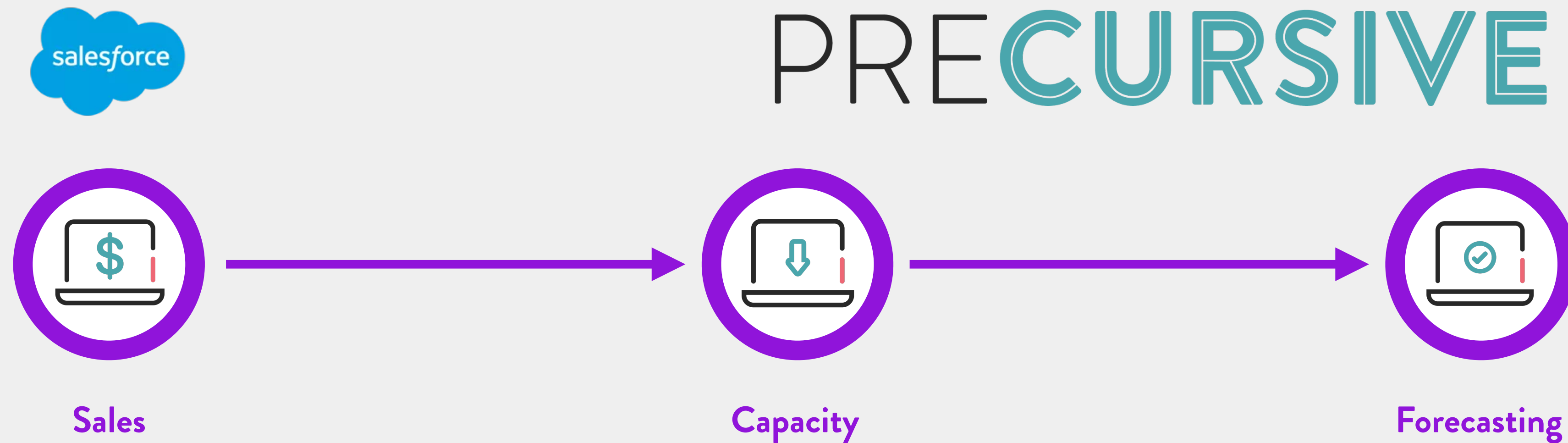


Financial
Forecasting

Capacity planning across all client projects
Accurate project forecasting & costing
Future financial forecasting

THE SOLUTION.

P3 had been using Precursive for over 3 years to help improve capacity management, project costing and financial forecasting. Project costing is automated as cost maps into Precursive from products in opportunities. Project costs are then reviewed and confirmed. The forecasting module helps P3 to understand their pipeline against capacity.



PRECURSIVE **SOLUTION.**



100%.

Better forecasting

P3's Financial Forecasting horizon has doubled. The team can now accurately forecast income up to two months ahead.



THREE.

Into one

Previously the team were working across multiple systems. P3 now works solely on the Salesforce platform.



THIRTY HOURS.

Saved monthly

The team saves hours each month, now that they have streamlined their systems. These hours can be spent on other tasks.

EMPOWERING SERVICES **TEAMS.**

Highest User Adoption
Mid-Market
SPRING 2023

Highest User Adoption
Mid-Market
WINTER 2023

Highest User Adoption
Mid-Market
WINTER 2023

CUSTOMER SUCCESS.

ENABLING OUTCOMES

Precursive team with enterprise experience at ABB, Fujitsu, Roche

LIGHTNING NATIVE.

TECHNICAL INNOVATION

> \$1 Billion in project value managed in Precursive

ENTERPRISE SECURITY.

TRUST & PRIVACY

GDPR compliant
ISO 27001: 2013 certified

Highest User Adoption
Mid-Market
SUMMER 2022

Highest User Adoption
Mid-Market
FALL 2022

Highest User Adoption
Mid-Market
FALL 2022



PRECURSIVE

★★★★★ 5.0
Average Rating

PRECURSIVE **CUSTOMER SNAPSHOT.**

High Tech.



Professional Services.



PRECURSIVE

PRECURSIVE

THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

www.precursive.com