PRECURSIVE CASE STUDY.
CUSTOMER - UNIFIED
SOCIAL ADVERTISING SERVICES

unified

PRECURSIVE

PLAN. TRACK. FORECAST.

CUSTOMER: **UNIFIED.**

Unified brings clarity and control to social advertising investments. Unified provides a data and intelligence platform which collects, connects, and enriches social advertising data, providing marketers with unprecedented ownership and transparency. It gives them access to the information and intelligence they need to make informed decisions about their social investments, reduce risk, and increase their bottom line. Unified has teams of experts to ensure data quality, optimize investments, and help clients succeed on all levels of social advertising - including enabling them to become experts themselves.

https://unified.com/

"We have been using Precursive for almost 2 years and it has greatly simplified our workflow by seamlessly transitioning:
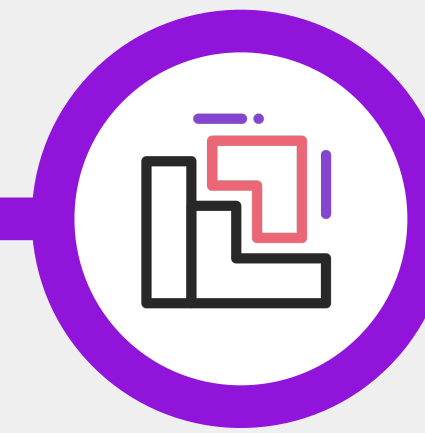
Opportunity - Project - Resourcing - Budgeting - Tracking Time - Reporting

There are a ton of advantages of keeping everything in a single platform and our implementation of Precursive is a great example of that. Workflow Bliss!"

MATT PILCER.
Executive Vice President of Technology
UNIFIED

PRECURSIVE

HOW UNIFIED **USES PRECURSIVE.**

1. Resource Allocation
Visibility on their entire resource pool and all allocated projects, to balance workload.

2. Forecasting
Improved tracking enables more accurate revenue forecasts and better decisions.

3. Automated Reporting
Real-time data generated on capacity, profit and utilization in Salesforce to maximize their visibility.

4. Time Tracking
Easily monitor the time your staff spend on each task and log it on your Precursive boards.

5. Precursive Mobile
Staff can record their times against activities on an easy-to-use app.

Key point: Simplified workflows help to transition between sales and delivery activities.

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CUSTOMER **CHALLENGE.**

Unified has consistently been a high growth company and was looking for a way to help support and scale that growth. Unified's workflows were in much need of improvement with the services team wanting a clear view of upcoming work in order to mobilize projects more quickly.

There were several key areas in which to improve these workflows:

- **Giving the professional services team a clear picture of upcoming projects.**
- **Improving the mobilization of project teams to onboarding new clients.**
- **Tracking project performance and getting real-time MI for decision making.**

THE **SOLUTION.**

salesforce | The World's #1 CRM

PRECURSIVE | The Services Delivery Cloud for Salesforce

Opportunity Management   **Quote Generation**

Track & monitor leads
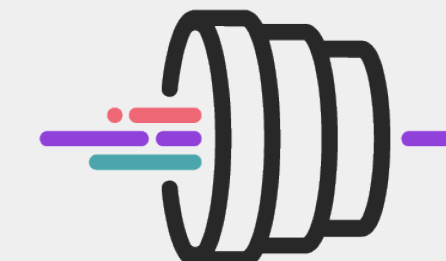Manage and forecast opportunities
Quotes for labor and product

Resource Allocation   **Project Budget**   **Automated Reporting**   **Real-time Dashboards**

Projects (incl. timelines & budgets) created automatically
Plan & allocate resources across multiple projects
Track project tasks, time, progress & margin

Reports generated on capacity
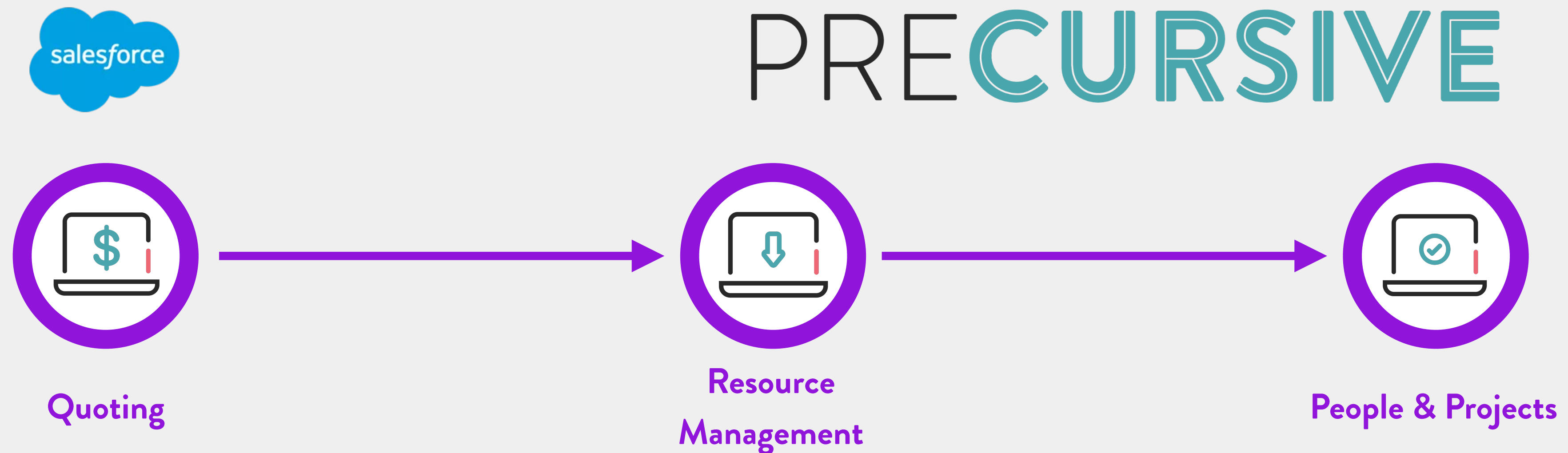Analytics on project profitability
Utilisation data across teams and skills

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THE **SOLUTION.**

Unified have been using Precursive for over two years, integrating our tool with the sales and quoting tools from Salesforce, so projects with relevant timelines and budgets are created automatically when a deal is closed.

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Quoting → Resource Management → People & Projects

PRECURSIVE **SOLUTION.**

REDUCED.
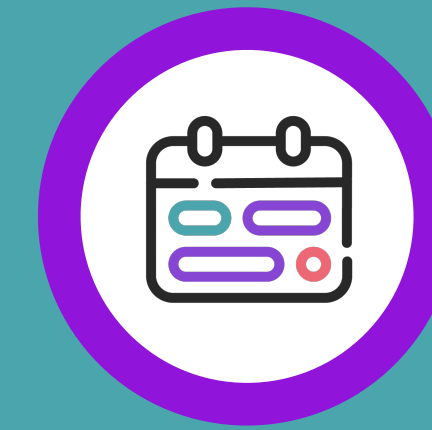Burden of admin on staff

Simplified workflows helping to transition between sales and activities. This is a valuable saver in terms of time and costs.

INCREASED.
Retention

Automation providing more time back to mangers and front-line teams, allowing them to instead focus on high-value tasks.

TRACKED.
Project performance

Improved delivery times and better allocation of resources, increasing internal efficiency as well as customer satisfaction.

EMPOWERING SERVICES **TEAMS.**

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

salesforce **PARTNER** SINCE 2013

PRE**CURSIVE**

★★★★★ 5.0
Average Rating

PRECURSIVE **CUSTOMER SNAPSHOT.**

High Tech.

Google

MHR

ALLOY

BetterCloud

GONG

Professional Services.

Challenger

torrent CONSULTING

Talentful

JACK MORTON

cts

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THE SERVICES DELIVERY CLOUD FOR SALESFORCE

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www.precursive.com