



PRECURSIVE CASE STUDY.

CUSTOMER - ATLANTIC TECHNOLOGIES
DIGITAL TRANSFORMATION CONSULTANTS

PRECURSIVE

PLAN. TRACK. FORECAST.



CUSTOMER: **ATLANTIC TECHNOLOGIES.**

Atlantic Technologies' IT Consulting solution guides firms in implementing the best Cloud technology in ERP, CRM, HCM, and analytics. Atlantic pairs businesses with the best technology solutions on the market by listening to and analyzing their needs. By doing this, Atlantic can recommend the best fit for every client to bolster their business strategy and ensure the digital transformation runs smoothly.

Operating on the Salesforce platform, Atlantic enables companies to seize the opportunities made available over time by technology to respond quickly to new market and customer needs. This strategy empowers clients to innovate their service offer on different markets, to maximize the efficiency of processes, or to offer an even more personalized service to customers.

<https://atlantic-technologies.com>

We don't want to guess. Precursive becomes a single source of truth for us. Here's where our projects are and here's when people are rolling off. There's an art to consulting but it should be on getting in front of the customer and being creative with them.

It shouldn't be on trying to assemble a team or getting the right people in the right place at the right time. That's the science and that's Precursive.

MIKE DOHRMANN.

Managing Director

ATLANTIC TECHNOLOGIES

HOW ATLANTIC TECHNOLOGIES **USES PRECURSIVE.**



1.

Capacity Management

Project templates can be built and refined overtime. 10-20 projects managed at once.



2.

Forecast Demand

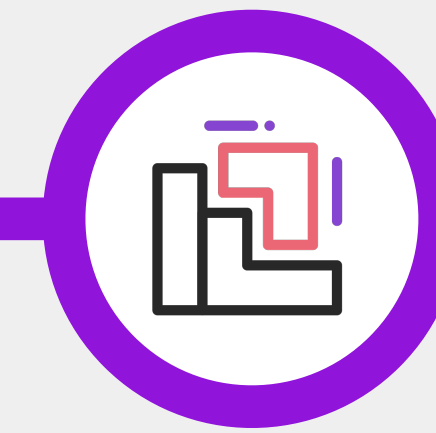
Ability to share detailed project plans with clients to keep them in the loop.



3.

Billing

Reporting across all key metrics including project progress and time-to-value, and many more.



4.

Project Management

Enhanced visibility and reporting across all projects within Precursive.

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.**

Atlantic were searching for a Salesforce PSA that could support their current and future business growth. Managing human capital was a priority, as was the ability to view all bookings, billings and revenue management on just one platform. When it came to demand forecasting, Atlantic had no visibility on what work was coming through the pipeline. Not having this insight can cause delays in project timelines, and a diminished capacity to meet demand fluctuations effectively.

Atlantic were often relying on spreadsheets for their reporting. Their time tracking capability consisted of entering information into Billquick and Excel, which was swallowing up a considerable number of hours validating hours. They had no reporting functionality that automatically fed into financial and project reporting, creating a lack of real-time insights and increasing the risk of project overrun.



THE SOLUTION.



The World's
#1 CRM

PRECURSIVE

The Services Delivery
Cloud for Salesforce



Opportunity
Creation

Manage sales pipeline

Send quotes to client

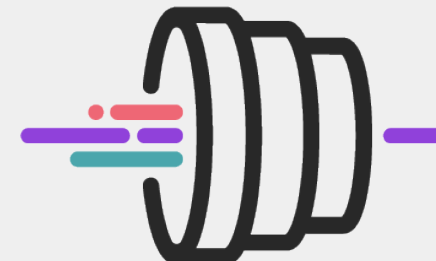
Align sales with delivery teams



Quote
Management



Task
Allocation



Project
Management

Plan and manage projects

Allocate activities and tasks

Collaborate with customers

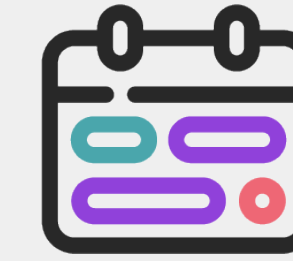


Resource
Allocation

Schedule and manage teams

Forecast capacity crunches

Automate staff notifications



Capacity
Planning



Revenue
Management

Monitor budgets and costs

Forecast and recognize revenue

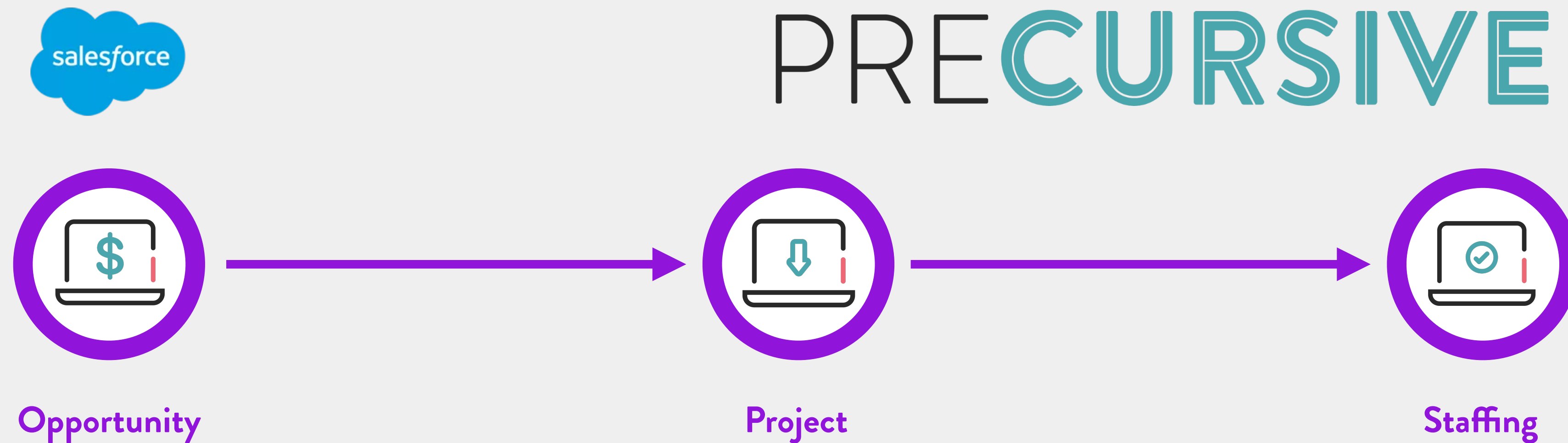
Track time and expenses



Services
Billing

THE SOLUTION.

Atlantic have been using Precursive for over 6 years to help staff projects, manage capacity and forecast hiring requirements. Through Precursive, Atlantic can track the performance of project budgets and margins, as well as managing billing to customers.



PRECURSIVE **SOLUTION.**



IMPROVED ACCURACY.

In the billing process

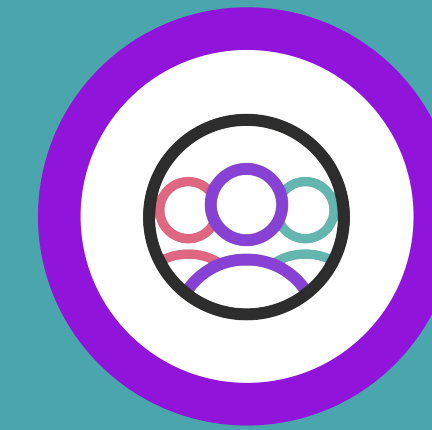
Time tracked accurately with quick end of month reconciliation and invoicing to client to keep them in the know.



WORKLOAD.

Equality

Improved utilization management to drive productive billing, balanced with not overworking staff to improve engagement.



10X INCREASE.

In headcount

Managed over an 18 month period with predictive hiring of skills and capabilities to increase productivity and reduce turnover.

EMPOWERING SERVICES **TEAMS.**

CUSTOMER SUCCESS.
ENABLING OUTCOMES

LIGHTNING NATIVE.
TECHNICAL INNOVATION

ENTERPRISE SECURITY.
TRUST & PRIVACY

Highest User Adoption Mid-Market SPRING 2023

Highest User Adoption Mid-Market WINTER 2023

Highest User Adoption WINTER 2023

Highest User Adoption Mid-Market SUMMER 2022

Highest User Adoption Mid-Market FALL 2022

Highest User Adoption FALL 2022

Precursive team with enterprise experience at ABB, Fujitsu, Roche

> \$1 Billion in project value managed in Precursive

GDPR compliant
ISO 27001: 2013 certified



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