

White Paper
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**Selecting the Right Business Productivity Suite for
Project-Based Organizations Involves a Team Effort.**

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Introduction

In an ideal world, all project-based organizations, such as advertising agencies, architectural firms, and engineering companies, work in an atmosphere of maximized business productivity. In this state of business euphoria, creative types become more creative, programmers become more innovative, and team leaders have more control of managing money, time and people.

Unfortunately, often times in the real world, business processes have a tendency of getting in the way, limiting the ability for members of project-based organizations to optimally use their talents to deliver the best possible end products for their customers. Therefore, in order to be successful, it is essential for project-based organizations to find a way to get business processes out of the way.

Business Process Management (BPM) software can solve many business process problems throughout the organization. But before giving the IT department the task of implementing a BPM solution, it is important to initiate an organization-wide team investigation.

This white paper provides the reader with information on what project-based organizations need in a business productivity tool and how to go about selecting the right tool for their organization's unique needs.

Paths To the Right Solution: Team-based Search Initiative

The road to maximized business productivity involves some work. In the case of selecting the right tool, it is important that representatives from different teams and departments are involved in the search process. A critical step in choosing the right solution involves the creation of an internal team whose goal is to decipher which solution is best for their organization.

In order to be successful in this initiative, project-based organizations must form a complete core team that not only knows about the current business processes which run their organization, but also intimate with it. Core team members should consist of those individuals who will live with the deployment of the project and who will most likely be using the tool every day.

This core team brings in the IT architects for tool evaluation into the selection process, but should not base their choice solely on what the IT people say. Above all, it is not recommended to simply hand the tool selection process over to the IT department and wait for a response and final implementation.

Before the search begins, project-based organizations should make a list of what's needed by all departments. Their evaluation should consider the opinions and motivations of all parties involved, which in all likelihood, is everyone that is part of the organization.

The Right Tool Maximizes Business Productivity

In order to be successful, project-based organizations must maximize business productivity. This means that business processes, the underlying tasks necessary to run a business, must get out of the way of those whose focus is to produce and deliver quality work to their customers. Simply put, maximizing business productivity in a project-based organization releases the grasp that repetitive work has on creative and innovative energies crucial to the success of a project-based and customer driven organization.

Project-based organizations need an extensive and increasingly adaptive set of business processes to run cost-effectively and at the most optimal level possible. Technology can certainly help in this endeavor. The challenge, however, lies in the challenge of finding the right technology that not only meets the needs of your organization, but that can be adapted to personal preferences of individuals using the system.

High on the list of selection criteria among project-based organizations are Business Process Management (BPM) tools. There are many solutions on the market today that emphasize a few disparate capabilities often tied to BPM tools. However, ideal BPM tools have evolved beyond the technology basics of business process management and have converged multiple capabilities into a single software suite of tools.

The right solution should enable project-based organizations to streamline the execution of business processes by automating workflow tasks, eliminating redundant steps, and supporting congruent execution of tasks. Additionally, managers should feel empowered to take full responsibility for designing and optimizing their end-to-end processes. When a cost-effective tool enables

process managers with direct control and management of executing processes, there is minimal reliance on the IT organization.

To make the IT organization's life easier, it is also important that the chosen system enable organizations to initially set up the tool once – with core functionality to automate the whole business process for the entire organization for a long period of time. If the system needs some alterations in the future, data should be secure and the process of change should be easy and not require a rewrite of the entire business process.

The Ideal Solution

Since the goal is to get business processes out of the way, the right BPM software tool should offer an easy-to-learn, multi-platform, multi-user management tool which offers project-based organizations a full array of powerful tools to streamline and refine the entire business process – from the moment a prospective client calls to the moment the final invoice is sent.

Ideally, because everyone in the organization will use the tool, it should make everyone happy. It should offer a cross-platform, client-server solution for estimating, time and expense tracking, prioritizing, resource scheduling, invoicing, accounting, and reporting. Additionally, the tool should include accounting functionality with A/R, A/P and G/L, Customer Relationship Management (CRM), Professional Services Automation (PSA), and more. Therefore, everyone, whether they use Macs or PCs for their design, drafting, programming, or accounting, should be able to learn and use this tool for maximum business productivity throughout the organization.

The ideal BPM Software tool yields numerous benefits. With the right business process management automation tool, project-based organizations can:

- Unify and streamline all your business processes for greater productivity and profitability
- Provide immediate access to all information
- Eliminate clerical inefficiencies
- Cut administrative overhead
- Deliver work more reliably and cost-effectively
- Realize improved profitability and sustainable growth

While all the above benefits can be realized with an ideal BPM Solution, the top three benefits for project-based organizations, especially small to mid-sized companies, are increased reliability, cost savings, and improved efficiency.

About Management Software

Management Software is a leading developer of business process management software for service businesses on Macintosh and Windows. Management Software is based in Homer, New York, where it has provided vertical software applications, custom programming services, consulting, and training since 1989.

Using the technology of 4th Dimension, a relational database programming environment, Management Software develops affordable software applications for automating business operations and procedures.

About JobOrder

JobOrder is comprehensive and robust software that automates the flow of information throughout your entire business – from the moment a prospective client calls for a proposal until the final invoice is sent.

JobOrder provides state-of-the-art functionality and automation capabilities for project-based organizations, including advertising agencies, architectural firms, construction companies, consulting firms, design firms, engineering companies and job shops. JobOrder is an easy-to-learn, multi-user management tool that is designed to maximize business productivity. With JobOrder, your organization will:

- Create accurate estimates every time
- Systemize jobs with detailed specifications
- Prioritize traffic and reschedule staff in seconds
- Manage change orders
- Monitor resources effortlessly
- Send invoices out promptly
- Streamline accounting
- Generate reports instantly
- Identify problems before they get out of control
- Plan for the future with confidence

Unlike other products on the market that emphasize one or another of these functions, JobOrder offers its users a full array of powerful tools to streamline and refine your entire business process.

Everyone, whether they use Macs or PCs for their design, drafting, programming, or accounting, can use JobOrder. JobOrder offers a cross-platform, client-server solution for estimating, time and expense tracking, prioritizing, resource scheduling, invoicing, accounting, and reporting.

JobOrder includes Accounting with A/R, A/P and G/L, Customer Relationship Management (CRM), Professional Services Automation (PSA), and more.

For More Information

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