

## Proactive Worldwide Case Study

### Omnios Helps Proactive Worldwide Streamline & Centralize Financial & Project Accounting Processes & Systems

Proactive Worldwide (Proactive), headquartered in Rolling Meadows, IL, is one of the fastest-growing competitive business intelligence firms in the U.S. with proven expertise in consumer goods, industrial goods, financial services, healthcare, life sciences, telecommunications and technology. The company combines proven methodologies with world-class expertise to deliver the industry's broadest set of customized, cost-effective competitive intelligence solutions available.

#### Customer Profile

Proactive Worldwide (Proactive) is one of the fastest-growing competitive business intelligence firms in the U.S., with proven expertise in consumer goods, industrial goods, financial services, healthcare, life sciences, telecommunications and technology.

#### Situation

As one of the fastest-growing competitive intelligence firms in the U.S., Proactive's management was struggling to keep up with the rapid growth of their company. With no centralized business management system and a heavy reliance on spreadsheets that require considerable effort to maintain, Proactive needed new business processes and technology to effectively manage and sustain its growth.

#### Solution

Proactive partnered with Omnios to develop and implement a financial and project accounting solution to serve as the core of its new business information platform and to provide a solid foundation for the creation of more efficient and effective business processes.

#### Results

- Streamlined and centralized financial and project accounting processes and technology
- Provided real-time financial reporting and analytics to enhance decision-making
- Streamlined internal financial and project accounting processes
- Established a foundation for the expansion of the solution to meet the future and growing needs of the company



*Omnios had the experience we required to manage the transition of our current business technology platform to one that can adapt to our business growth. Their team of consultants was easy to work with, quick to respond and possessed the talent to tailor our new system to fit our needs perfectly.*



**– COO, Proactive Worldwide**



## Business Situation

As one of the fastest-growing competitive intelligence firms in the U.S., Proactive's management was struggling to keep up with the rapid growth of their company. With no centralized business management system and a heavy reliance on spreadsheets that require considerable effort to maintain, Proactive had outgrown its existing financial and project accounting systems.

The need for new business management systems was evidenced by Proactive's inability to measure profitability by line of business and department. Additionally, management was experiencing difficulties tracking revenue and employee time at the project level. Proactive's management knew they needed to take a serious look at their business processes and implement a reliable, multi-functional financial and project accounting solution to keep pace with their growth and better manage their operations.

Proactive required a solution that would eliminate redundant data entry and their reliance on a manual, time-intensive billing process. Requirements also included the ability to track and analyze business and operational metrics in real-time without losing productivity. Finally, the new system had to integrate with and take advantage of Proactive's already existing technology foundation allowing for the further return of prior investments.

"With our considerable growth over the last few years, we needed an organization who could not only deploy and implement the selected technology, but who would also perform an objective and comprehensive review of our current technologies and processes to provide the expertise and recommendations needed to get us to where we needed to be," said COO of Proactive.

## Business Solution

Proactive partnered with Omnios to develop and implement new business processes that would improve operational efficiency. Through a series of consultative sessions, process evaluations, and analytical reviews, Omnios was able to recommend a plan of functional remediation steps to assist Proactive in moving forward with a software implementation project. Microsoft Dynamics was chosen as the "best fit" solution to automate these new business processes.

By leveraging Omnios' knowledge and experience with professional service firms, Proactive was able to deploy a solution allowing for reductions in their billing cycle, enhancements in cash flow and improved efficiency with time and expense collection. Additionally, the solution provided advanced reporting and analytical tools to support management decision-making while delivering on-demand information to increase customer service levels.



"Omnios had the experience we required to manage the transition of our current business technology platform to one that can adapt to our business growth. Their team of consultants were easy to work with, quick to respond, and possessed the talent to tailor our new system to fit our needs perfectly," said COO of Proactive.

## Business Results

Omnios worked closely with Proactive's management to implement more efficient business processes that were supported by a fully integrated financial and project accounting system enabling them to quickly adapt as the company grew.

"Through improved operational processes and a centralized system deployed by Omnios, we now have a business management platform to expand our financial and project accounting needs as we continue our growth," said COO of Proactive.

### **Streamlined and centralized financial and project accounting processes and technology**

Proactive was quickly outgrowing their existing systems, and their outdated business processes were only adding unnecessary layers of complexity and inefficiency. Omnios streamlined internal business processes and deployed a centralized technology platform eliminating Proactive's reliance on disconnected spreadsheets. With the removal of these additional steps and the addition of a single system, Omnios enhanced Proactive's business efficiency.

### **Provided real-time financial reporting and analytics to enhance decision-making**

With the deployment of their new business management system, Proactive was able to attain real-time, comprehensive reporting of sales and earnings. The central location for project financial and budget information improved operational efficiency by making it easier for employees to monitor project budgets against actual costs incurred while eliminating the challenges associated with disparate, confusing or out-of-date spreadsheets.

"Improvements in our business operations have not only helped us become more productive, but have given us a competitive advantage in securing new clients and projects," said COO of Proactive.



### **Streamlined internal financial and project accounting processes**

Omnios worked with Proactive to develop new, unique processes in accounting for tracking and monitoring key financial metrics designed specifically for Proactive's business. Through the deployment of Microsoft Dynamics and related advanced analytical tools, Proactive attained the ability to analyze these metrics in a real-time, on-demand environment providing greater flexibility to management and the accounting department.

### **Established a foundation for the expansion of the solution to meet the future and growing needs of the company**

Omnios laid business process and technology foundations to ensure Proactive had the ability to quickly adapt for future growth.

"Every company experiences change. With the full integration of our systems into one business information platform, we now have the confidence to meet this change head-on at all levels of our company," said COO of Proactive.

### **About Omnios**

Omnios is a leading provider of consulting services for organizations with a focus on business process improvement, financial and project management policies and procedures, and supporting software tools. We work primarily with professional service and project centric businesses that want to improve their profitability and productivity by better managing specific projects, jobs, cost centers and initiatives. We specialize in planning, designing and building streamlined and effective business systems, which allow organizations to focus on their strategic objectives and running a successful business.

