ERP for Professional Services - Deloitte PDS Group Case Study
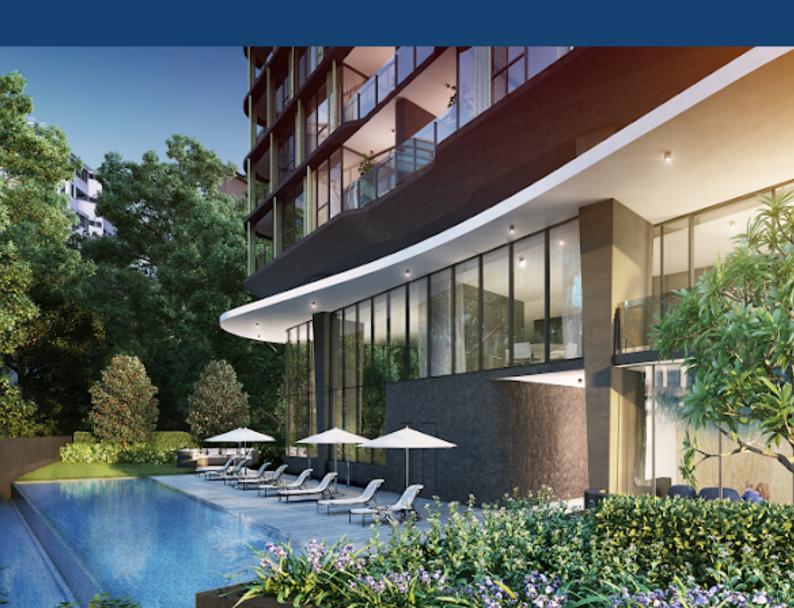
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Foreword

Dear Colleagues,

This case study will reflect UniPhi's ERP capabilities as they relate to professional services firms.

In this case study we will demonstrate how UniPhi's consulting and analytics team developed and collaborated with Deloitte PDS Group to create customised Power BI finance and resource planning dashboards embedded into the UniPhi web application which provided Deloitte PDS Group with the desired current requirements, and future reporting possibilities.

Prior to Microsoft releasing Power BI in July 2015, UniPhi's Founder and CEO, Mark Heath, had been looking for ways to provide flexibility when presenting data captured in its software, which included the development of its template engine, custom SQL Reporting Services Reports and UniPhi's 2009 release of a "Data Warehouse in a Box" feature. Mark saw huge potential in the Microsoft Power BI tool to unlock and utilise data stored in UniPhi's core web application and integrated the functionality of Power BI into the UniPhi ecosystem, this enabled the production of "stand-alone" dashboards, charts and reporting capabilities, all customised to suit client specific requirements.

Rajeel Deo
COO
UniPhi

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Deloitte.

Deloitte PDS Group & UniPhi collaboration

Deloitte PDS Group specialise in high performance, cost effective and innovative integrated project management and development solutions for clients. www.deloittespds.com.au.

On 17 August 2021, Deloitte announced that it would transform its capability and market presence in the end-to-end public and private infrastructure project management space by joining forces with the team from PDS Group, and creating the business now known as Deloitte PDS Group.

At the time of the acquisition, The Financial Review (Street Talk) quoted the Deloitte Australia CEO, Adam Powick with the following statement: *"It was an interesting and innovative move for Deloitte to gain a greater share of Australia's property development and infrastructure spend by adding this service offering of project and development management to construction*

companies. With the construction sector, and the infrastructure agenda being such an important driver behind Australia's COVID-19 recovery, there is significant demand for advisory and project management services."

The same day, Andrew Fortey, Managing Director of PDS Group said:

"We have always had a relentless focus on providing our clients with the highest levels and quality of service, ensuring successful outcomes, enhanced reputations and longstanding repeat business. We see these same attributes in Deloitte and we look forward to sharing our advisory, development and project management capability further."

Prior to the joining of Deloitte and PDS Group, Andrew Fortey had a specific vision and requirement for the financial, resourcing and performance

reporting within the business. After an extensive online search, Andrew determined that UniPhi's business offering and solutions focussed platform appeared to provide the Power BI solution that the business had been looking for. With that in mind, Andrew contacted UniPhi via "BOOK A DEMO", on the website, and commenced initial enquiries.

Prior to PDS Group joining Deloitte (and throughout the acquisition and integration process) UniPhi collaborated with the business to streamline data capture processes/procedures, identified data integration and Power BI reporting objectives. UniPhi arranged and facilitated a kick-off workshop, where two key objectives were identified:

- Improve the efficiency of PDS Group data for all aspects of project performance; and
- Provide Project Leaders with the information required to effectively manage the projects.

Long term benefits included:

Visibility:
- The provision of detailed project reporting information enabling Project Leaders to make informed decisions
- Live data and reporting

Analysis:
- Reporting available to make informed decisions
- Clear priorities on work allocation

Efficiency:
- Remove duplication through integration with MS Outlook, accounting systems, document management and other platforms
- Enhanced timesheet reporting and management of the data

The initial deployment commenced in December 2021, 3 months after PDS Group joined with Deloitte. All objectives from the kick-off workshop were met with the UniPhi/Deloitte PDS Group collaboration delivering comprehensive data analysis which included reports, dashboards and charts to run and expand the business.

> " *UniPhi's 'can do' approach ensures the software can keep up with the vision and continuous improvement requirements required at Deloitte PDS Group.* "

Key benefits realised

The real benefit of the UniPhi platform is its facilitation of an end-to-end workflow that removes double handling of information, the provision of detailed report compilation for management and the ability to manage resource allocation based on project requirements. The flow-on effect of these efficiencies includes time savings, simplified invoicing, automated reporting, detailed project performance and work allocation.

Andrew Buckmaster, Partner, Deloitte PDS Group and key client contact with UniPhi commented:

"My team and I can rely on UniPhi to support whatever reporting customisation required to achieve the best results for Deloitte PDS Group, particularly the Finance and development teams. By collaborating with UniPhi we have established better reporting, incorporating time saving tools and measures. UniPhi's "can do" approach ensures the software can keep up with the vision and continuous improvement requirements required at Deloitte PDS Group."

UniPhi's COO Rajeel Deo agrees that the benefits

of working with innovative strategists and creators like Andrew Fortey and Andrew Buckmaster allow the software capabilities and functionality of UniPhi to stretch the boundaries of ERP for this market leading professional service business.

Deloitte PDS Group continues to collaborate with UniPhi to expand the use of UniPhi's software to include client service delivery analysis, and bringing the same efficiencies in providing live progress reporting to client projects. This next round of software enhancement will be the subject of a separate case study.

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