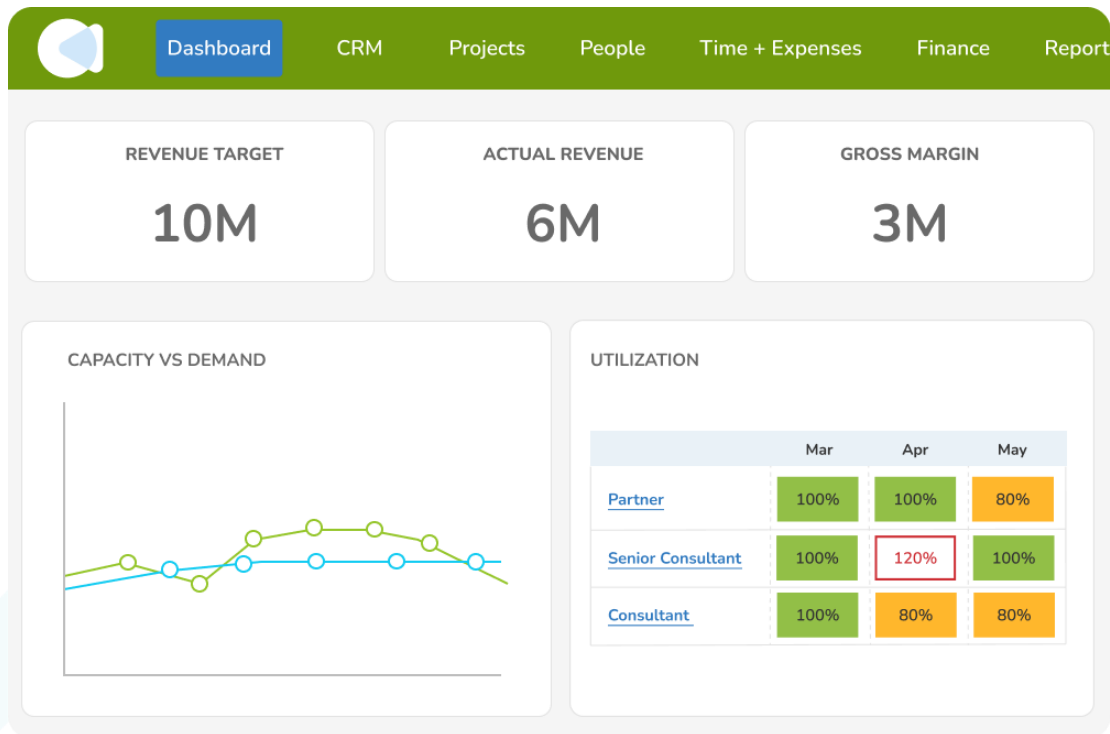




Introduction to CMap



CMap: the Company



>100

employees

>500

customers

>25k

users

CMap: the Product

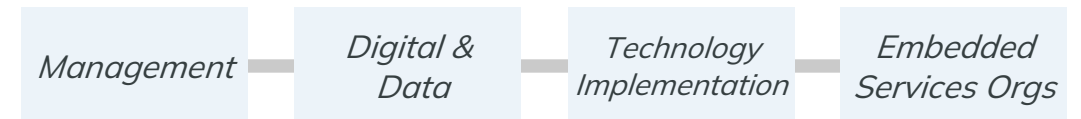


*An end-to-end operations platform,
purpose built for consulting firms...*

... trusted by leading brands...



... across multiple consulting disciplines



The backbone for the five core operational processes in your consultancy... ..



... helping you answer questions like... ..



How much **pipeline coverage** do we have?
Where can we **cross-sell additional services** to clients?



What's our **staff utilization**?
Based on future staffing demand, **when should we be hiring**?



How much **cost have we incurred to date**, vs. our budget?
What **time do we have available to bill** for our T&M work?

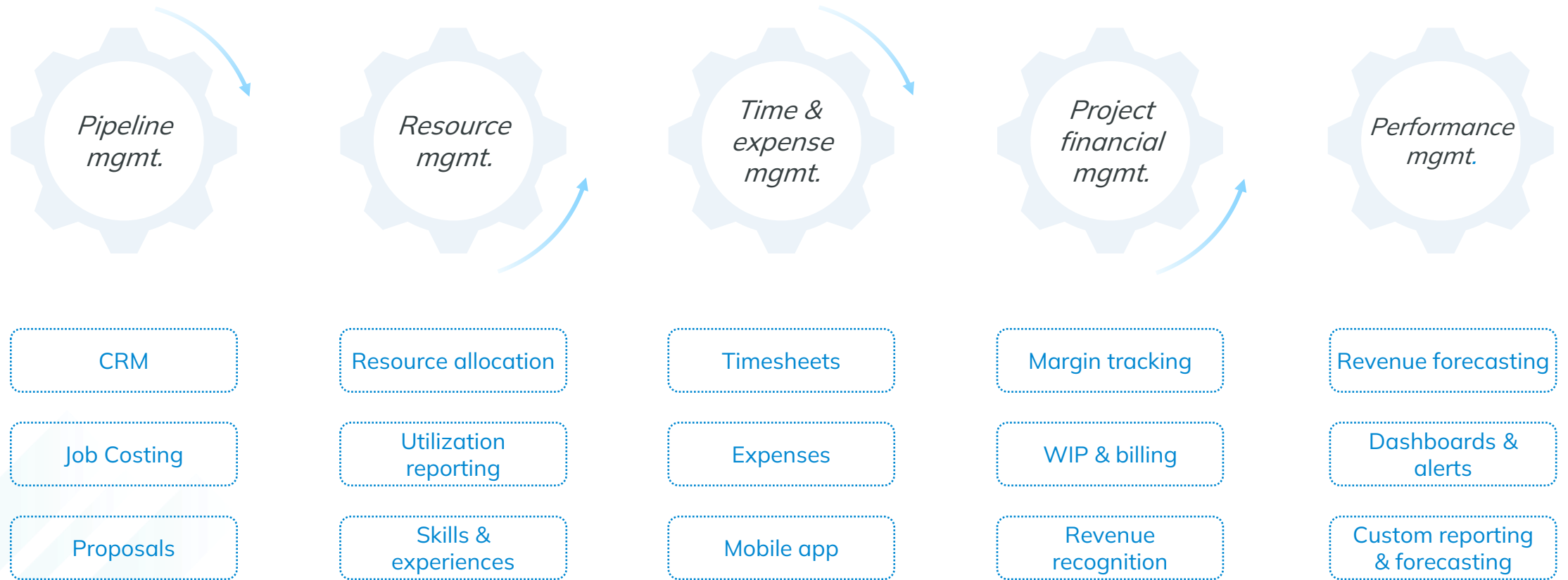


How **profitable is this project**, or client?
When should we **billing the client**, and how much?



What's our **revenue forecast**, across live & pipeline projects?
Which **portfolio of projects** is being delivered most profitably?

... with a single, end-to-end system spanning the full project lifecycle...

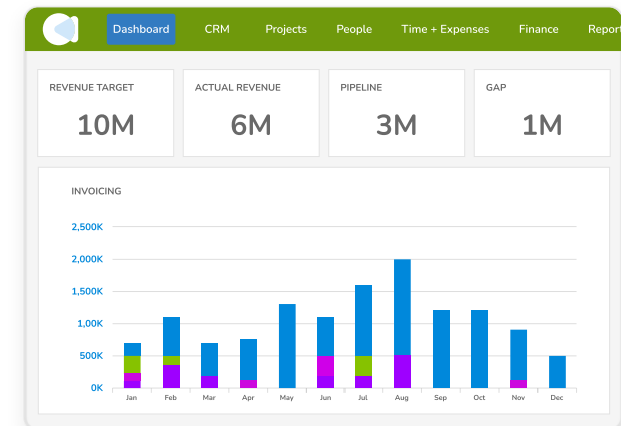
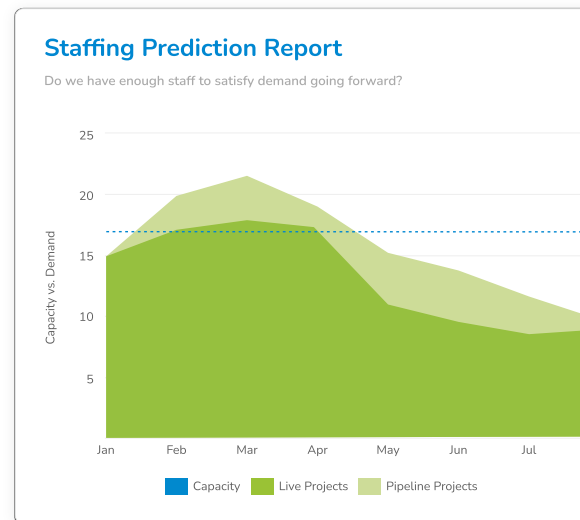


... and an engaging interface, driving adoption & delivering business outcomes



UTILIZATION

	Mar	Apr	May
<u>Partner</u>	100%	100%	80%
<u>Senior Consultant</u>	100%	120%	100%
<u>Consultant</u>	100%	80%	80%





CMap Functionality





CRM



Job Costing



Timesheets
& Expenses



Resourcing
& HR



Project
Management



Project
Financials



Reporting &
Dashboards



Integrations
& Add-Ons

A seamless view of pipeline and projects in one place

Dashboard CRM Projects People Time + Expenses Finance Reports

Company Details Activities KAM Profile Documents

ABC Holdings

Parent Company: [InStyle Global](#)
Main Phone: +44 (0)161 234 5678
LinkedIn: [abcholdings](#)
Finance Supplier Code: n/a

Company Owner: Nicholas Hickman
Fax: +44 (0)161 234 5670
VAT Number: GB7853948

Company Type: Limited Company
Website: [www.abc-holdings.com](#)
Payment Terms: 30 Days

Company Status: Active
Twitter: [abc-holdings](#)
Finance Account Code: ABCHOLD

Head Office: 1 Parsons Street, London, W2 5RD
Manchester Office: 15-19 Chapel Road, Manchester, M2 8TR
New York Office: 555 Madison Ave, 5th Floor, New York City, NY, 10022

Notes: ABC Holdings is part of Instyle Global. Andrea Abbot started as CFO in 2018, helping us to land our first project in 2019 after working with her during her time at Allied Investments Inc.

TIS Classification: Large Business (turnover £5m-£10m)
Year End Date: 30 Apr
Company Number: 03564356
Company UTR (Unique Taxpayer Reference): 1982732819

Employer PAYE Reference Number: 123/AB45678

SERVICE LINES

Audit & Assurance	No
-------------------	----

ANTI-MONEY LAUNDERING: OVERVIEW

AML Search Authorisation	Yes
--------------------------	-----

Dashboard CRM Projects People Time + Expenses Finance Reports

Company Details Activities KAM Profile Documents

ABC Holdings

Include Child Accounts

Current Potentials

Project Title	Project Type	Owner	Sales Stage	Sale Value (GBP)	Est. End Date
1025 - Full Service	BSO - Accounting	Nicholas Hickman	Contractual Negotiations	14,215	Apr 2022
1044 - Restructuring	A&A - Audit	Nicholas Hickman	Proposal Submitted	19,000	Oct 2021
1058 - Audit Services	A&A - Audit	Nicholas Hickman	Qualified	36,215	Jul 2021
1060 - RPA Advisory	RAS - Data Protection	Nicholas Hickman	Unqualified	32,500	May 2021
Total				101,930	

Tags: Client

Child Companies: [Armstrong H](#), [Westside Lar](#)

Project: [1002 - Ann](#)

Last Potentials

Project Title	Project Type	Owner	Sales Stage	Cost of Sale (GBP)
1021 - Review of Management Accounts	RAS - Data Protection	Nicholas Hickman	Proposal Submitted	1,675
1027 - ABC	A&A - Audit	Nicholas Hickman	Proposal Submitted	5,961
Total				7,636

Live Projects

Project	Budget Fees	Budget Additional	Budget Total	Actual Fees	Actual Additional	Actual Total	Progress	Projected Recovery Rate
1020 - Annual Accounts	3,530	0	3,530	3,544	0	3,544	100%	100%
1026 - Strategy Consultancy	15,175	759	15,934	9,843	402	10,245	69.69%	107%
1029 - Digital Strategy	19,608	144	19,752	14,185	0	14,185	69.64%	96%
1042 - Audit	21,180	0	21,180	18,000	0	18,000	72.1%	85%
1045 - Internal Audit Support	40,430	0	40,430	2,770	0	2,770	7.85%	115%
1046 - Review of Management Accounts	28,500	0	28,500	19,458	0	19,458	64.94%	95%
1047 - Consultancy	19,990	0	19,990	1,750	0	1,750	8.56%	98%
Total	148,413	903	149,316	69,529	402	69,931	-	-
Average	21,202	129	21,331	9,933	57	9,990	56%	120%



CRM



Job Costing



Timesheets
& Expenses



Resourcing
& HR



Project
Management



Project
Financials

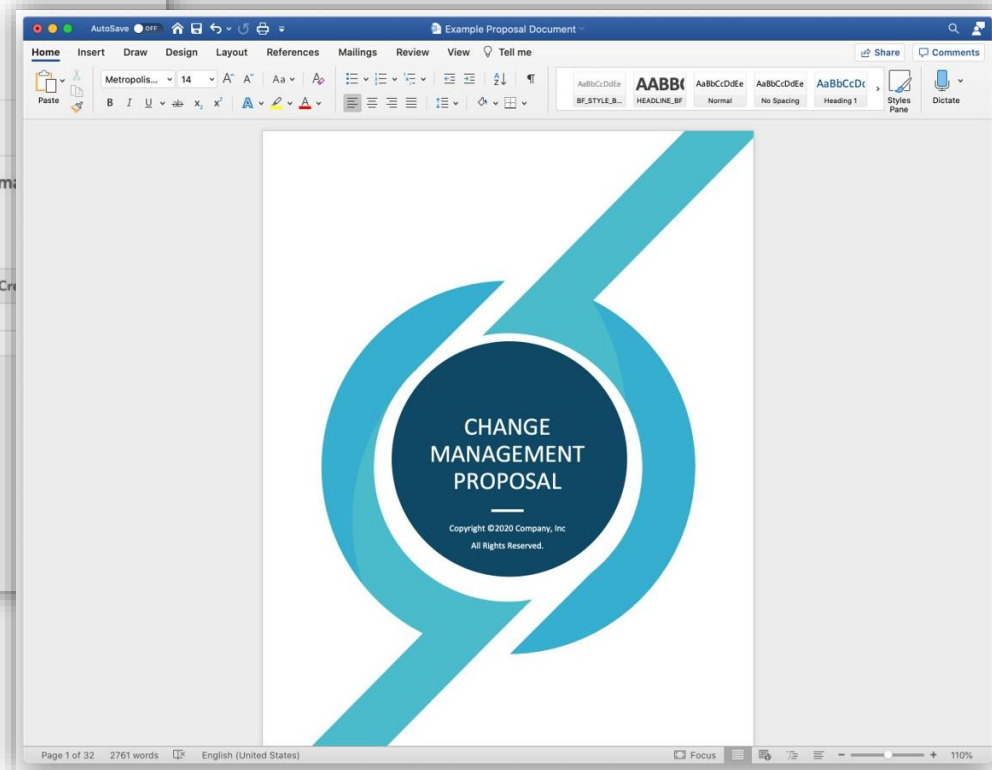
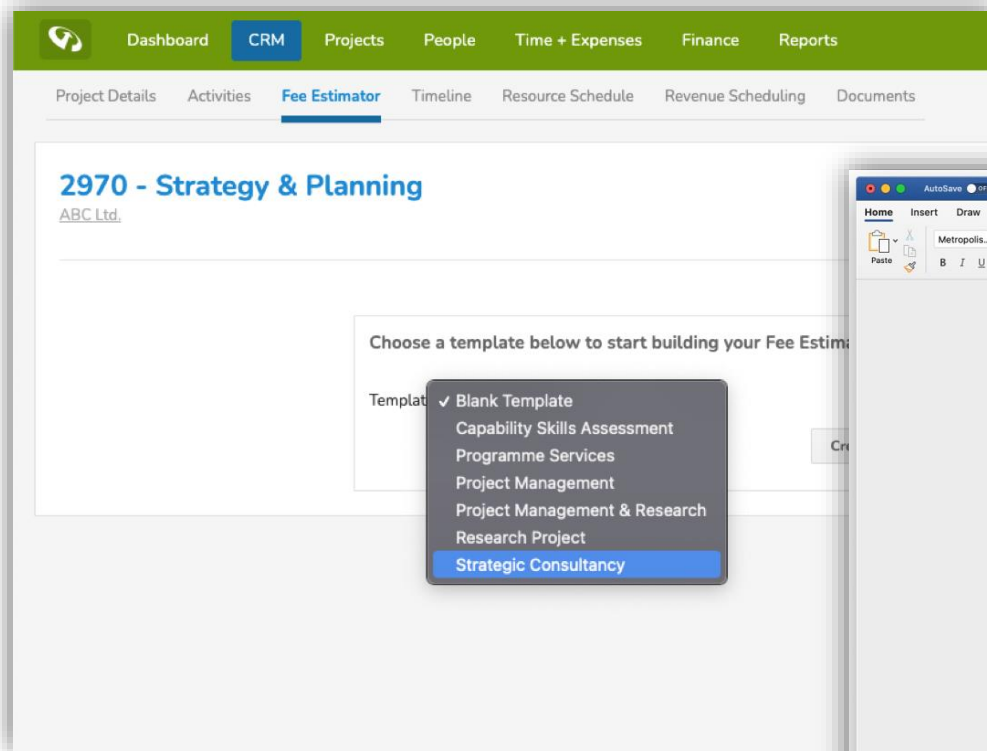


Reporting &
Dashboards



Integrations
& Add-Ons

Powerful tools for accurate and consistent quoting





CRM



Job Costing

Timesheets
& ExpensesResourcing
& HRProject
ManagementProject
FinancialsReporting &
DashboardsIntegrations
& Add-Ons

Take the friction out of timesheets and expenses

CMA 🔍 ☰ +

Enter time for 1002 - Change Management

M	8.0	Notes
T	0	Notes
W	0	Notes
T	0	Notes
F	0	Notes
S	0	Notes
S	0	Notes

Remove Add or Cancel

Add an Expense Item ?

Category * Accommodation ?

Date * 22/07/2021 ? **Description** * Overnight stay for client meeting ?

Amount * 150.00 in GBP ?

Reimburse * Yes ? **Project/Contract** 1062 - Strategy & Planning ?

Tax * 20% ? **Internal Code** Please Select ?

Receipt * Yes

Timesheet for Hickman, Nicholas from 12/07/2021 Submit Timesheet

Timesheet ?	Mon Jul 12	Tue Jul 13	Wed Jul 14	Thu Jul 15	Fri Jul 16	Sat Jul 17	Sun Jul 18	Task Total
Internal Codes								
Annual Leave					8			8
Live Projects								
1047 - Consultancy ABC Holdings		4						4
1059 - Audit Services InStyle Global			8	8				16
1062 - Strategy & Planning Clearview Life	8	4						12
Daily Total:	8	8	8	8	8	0	0	40



CRM



Job Costing

Timesheets &
ExpensesResourcing
& HRProject
ManagementProject
FinancialsReporting &
DashboardsIntegrations
& Add-Ons

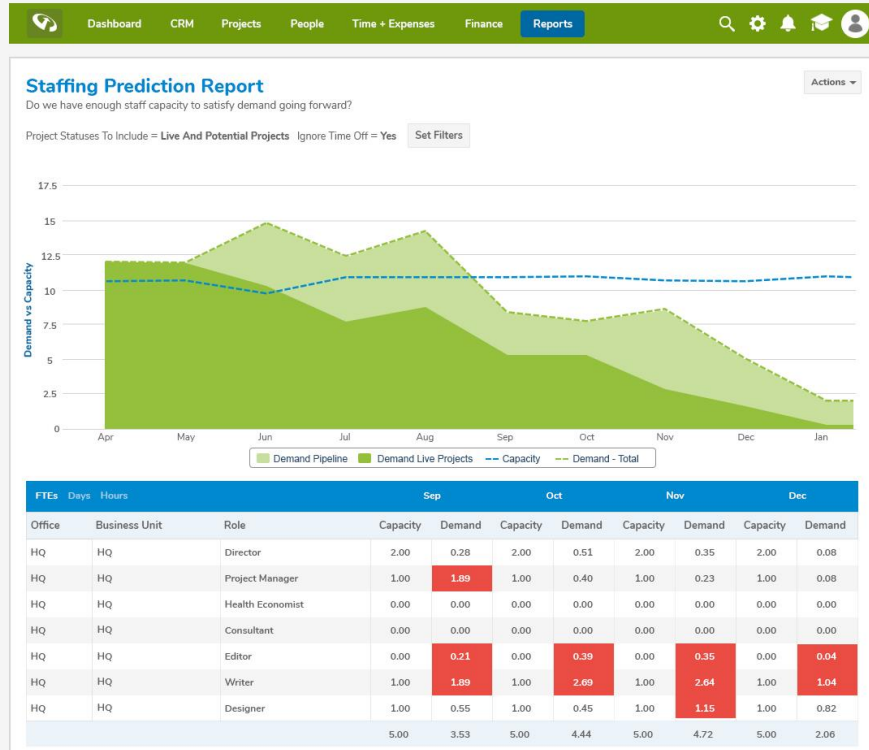
Better people decisions, driven by real-time data

Staff Utilization

Project Statuses To Include = Live And Potential Projects Exclude Holidays = No Exclude Placeholders = No Adjust for Probability = No

Set Filters

Resource Allocation		Days Weeks			
Role	Name	19 Jul 21	26 Jul 21	02 Aug 21	09 Aug 21
Project Manager					
Project Manager	Rashmina Begum	60%	60%	60%	60%
Project Manager	Jane Doe	100%	100%	100%	100%
Project Manager	Sam Jones	100%	100%	100%	100%
Project Manager	Piotr Kuzniak	200%	200%	60%	60%
Project Manager	Norman Underhill	0%	0%	100%	100%
Totals					
Current Staff		3.2	3.2	3.2	3.2
Time Off / Internal Codes		1	1	0	0
Allocated		2.8	2.8	3.4	3.4
Placeholders		0	0	0	0
Available / Overspill		-0.6	-0.6	-0.2	-0.2



 CRM



Project Costing

 Timesheets & Expenses

 Resourcing
& HR



Project Management

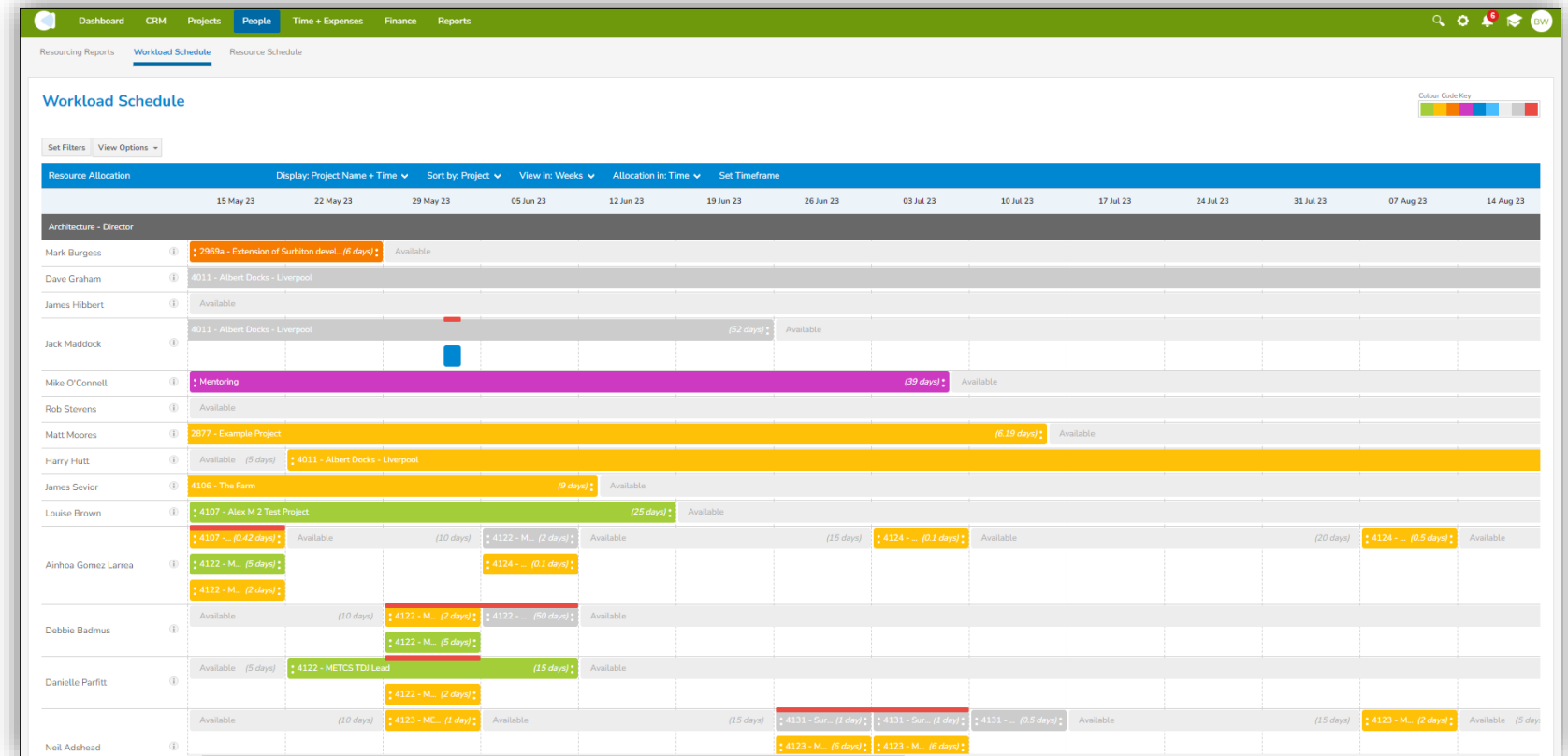


Project Financials

 Reporting & Dashboards

Integrations
& Add-Ons

Integrations & Add-Ons





CRM



Job Costing



Timesheets & Expenses



Resourcing & HR



Project Management



Project Financials



Reporting & Dashboards



Integrations & Add-Ons

Everything you need to get the work done

16342 - Website Project

ABC Inc

New Task

Who	Activity	6 Apr	7 Apr	8 Apr	9 Apr
DG	Arrange Kick-Off Meeting				
DG	Create Site Map & Specification				
MT	Create Design Concepts x 3				
DG	Client Review & Comments				
MT	Action Changes				
DG	Agree Design With Client				

Dashboard CRM **Projects** People Time + Expenses Finance Reports

Project Details Activities Fee Estimator **Budget vs Actual** Resource Schedule Financials

1003 - Strategy & Planning

Clearview Life

Exclude Additional

View by: [Project](#) | [Tab](#) | [IF](#)





CRM



Job Costing

Timesheets &
ExpensesResourcing
& HRProject
ManagementProject
FinancialsReporting &
DashboardsIntegrations
& Add-Ons

Financial tools that help to build financially strong companies

Dashboard CRM Projects People Time + Expenses Finance Reports

Standard Reports Custom Reports Report Builder

Invoicing Calendar

Year = 2021/22 Office = UK Set Filters

Account	Project	Owner	Apr	May	Jun	Jul	Aug	Sep
ABC Holdings	1026 - Strategy Consulting	Nicholas Hickman	1,265	1,265	1,265	1,376	1,265	1,265
ABC Holdings	1042 - Audit	Nicholas Hickman			810			
ABC Holdings	1045 - Internal Audit Support	Nicholas Hickman	4,998				4,998	
ABC Holdings	1046 - Review of Management Accounts	Jacqui Benson	15,500	2,500				10,500
ABC Holdings	1047 - Consultancy	Jacqui Benson	1,666	1,666	1,666	1,666	1,666	1,666
ABC Holdings	1048 - Accounts & Audit	Jacqui Benson	2,471	2,471				
Armstrong Holdings Ltd.	1001 - Annual Accounts & Audit	Jacqui Benson	12,500	3,500				
Armstrong Holdings Ltd.	1023 - Ad Hoc Tax Advice	Paul Archer	2,369	5,000				
Clearview Life	1003 - Strategy & Planning	Paul Archer	2,045					
Clearview Life	1028 - Ad hoc advisory	Paul Archer	1,400	1,238	1,238	1,102	1,102	
Clearview Life	1057 - Tax Compliance	Nicholas Hickman	900	900	900	900		
Clearview Life	1062 - Strategy & Planning	Nicholas Hickman				5,620	5,620	5,620
Futura Financial	1010 - Channel Island Tax Compliance	Nicholas Hickman						
Guerilla Research	1000 - Annual Accounts & Audit	Nicholas Hickman			1,553			
InStyle Global	1059 - Audit Services	Nicholas Hickman	10,520			10,520		
Lehmann Group	1002 - Annual Accounts & Audit	Guillaume Reyne	4,500					
Lehmann Group	1006 - Strategic Planning	Nicholas Hickman			6,000			
Zodiac Insurance Ltd.	1013 - Corporation Tax	Nicholas Hickman			20,000			
			60,133	18,539	33,431	21,184	14,650	19,050

Dashboard CRM Projects People Time + Expenses Finance Reports

Project Details Activities Fee Estimator Budget vs Actual Resource Schedule Invoicing Revenue Scheduling

37907 - Planning & Research

Anderson Development

PO Number: 1541: GBP 25,000 of 25,000 remaining.

Project: 37907 - Planning & Research

Title: Invoice for completion of Milestone 1

More Info

Item	Fee/Additional	Amount (GBP)
Fees as agreed	Fees	10,000.00
Rechargeable expenses	Additional	295.50
Subtotal		10,295.50
Tax @ 20%		2,059.10
Total		12,354.60

Create

Save Changes or Cancel

Template: Standard Invoice Template

Invoice To: Anderson Development

Contact: Anderson, Scott

Address: London Office

Tax Rate: 20%

Invoice Date: 30/06/2021

ACTIONS

Invoice in a different currency

Scheduled For: Jun 2021

Amount (GBP): 10,295.50

Invoice Type: Fixed Fee



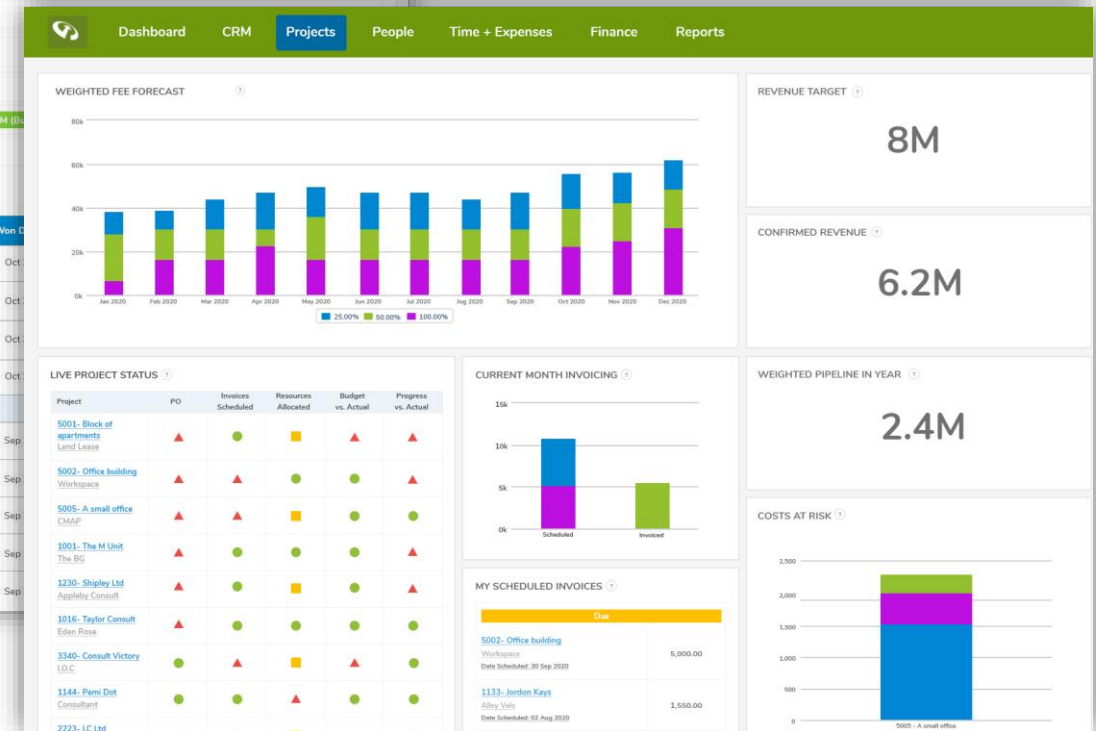
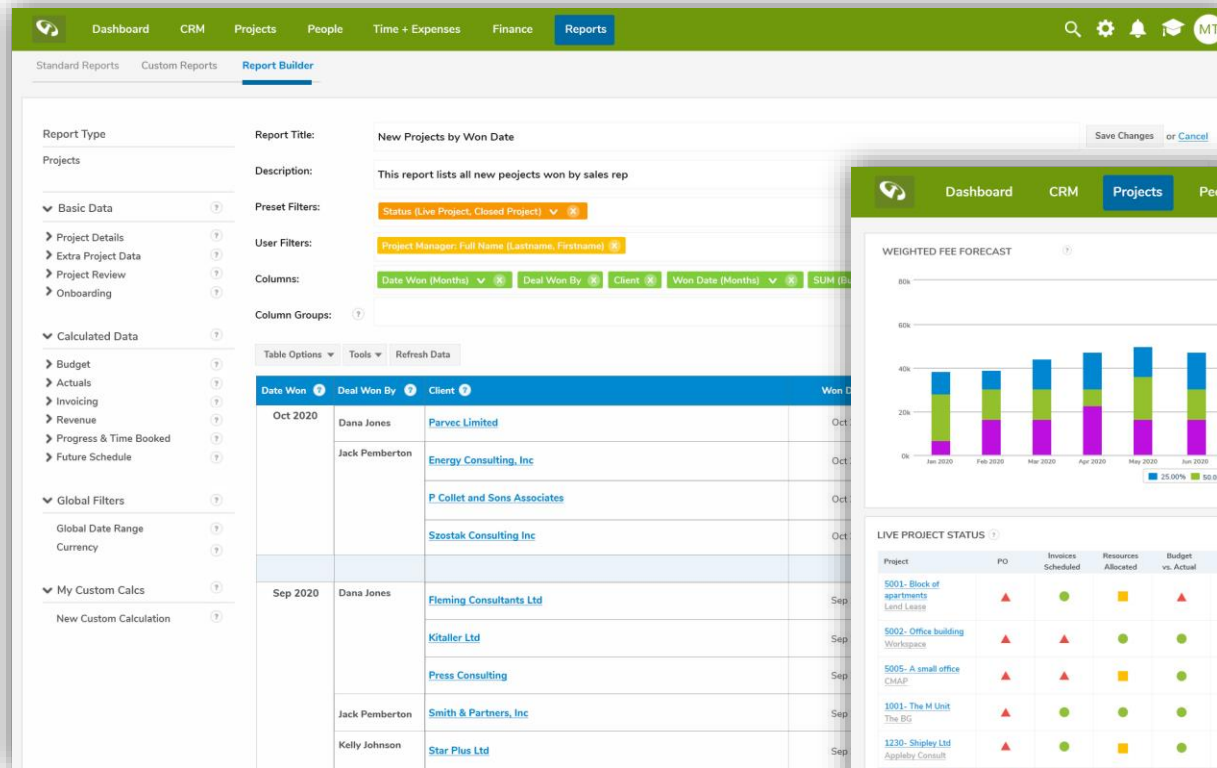
CRM



Job Costing

Timesheets &
ExpensesResourcing
& HRProject
ManagementProject
FinancialsReporting &
DashboardsIntegrations
& Add-Ons

Key data at your fingertips, generating rich insights





CRM



Job Costing



Timesheets &
Expenses



Resourcing
& HR



Project
Management



Project
Financials

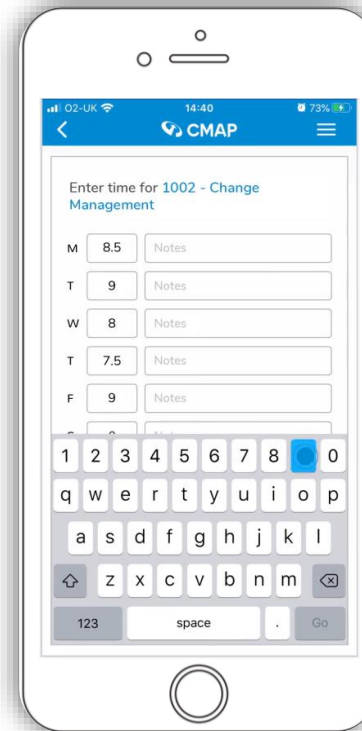
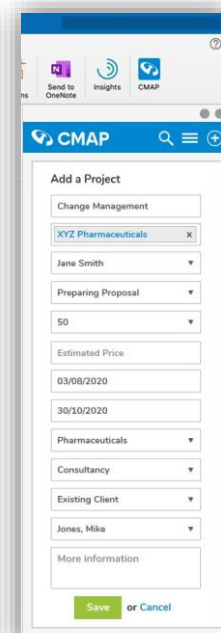
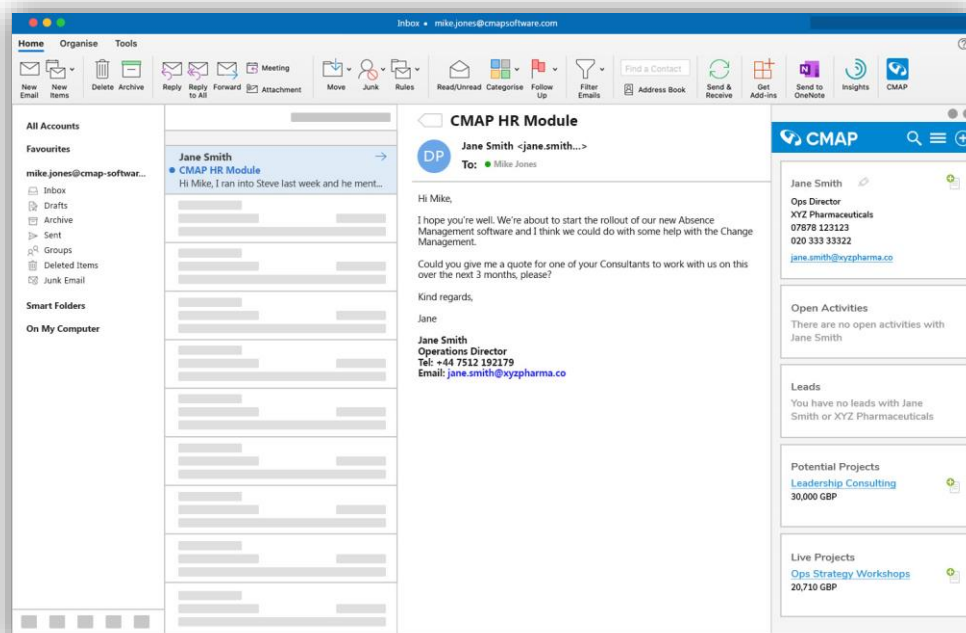


Reporting &
Dashboards



Integrations
& Add-Ons
(Mobile & Outlook)

Work how you want, where you want across mobile and Outlook





CRM



Job Costing



Timesheets &
Expenses



Resourcing
& HR



Project
Management



Project
Financials



Reporting &
Dashboards



**Integrations
& Add-Ons**
(Integrations)

Integrations to streamline processes and remove duplication

FINANCE

ACCOUNTS IQ

Microsoft Dynamics 365
Business Central

Microsoft
Dynamics GP

qb intuit
quickbooks

sage 50

sage
200cloud
Professional

sage Intacct



COLLABORATION



BI TOOLS



Power BI

Microsoft
SQL Server

tableau

yellowfin

Create, store and share documents in the cloud



CRM



Job Costing



Timesheets & Expenses



Resourcing & HR



Project Management



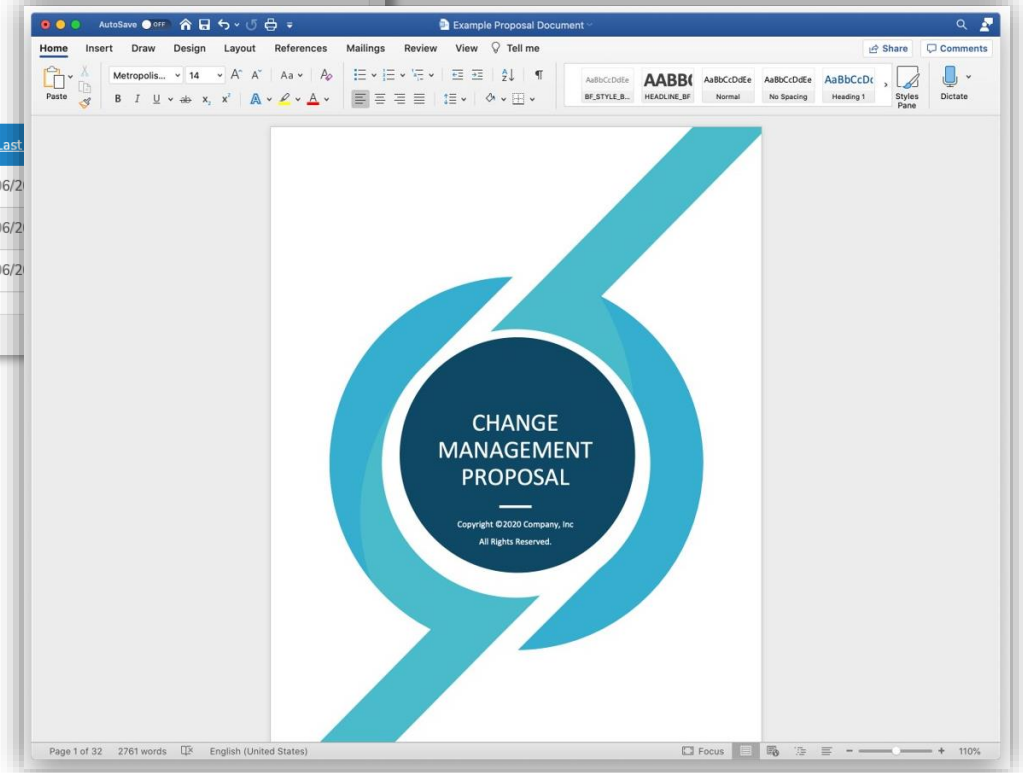
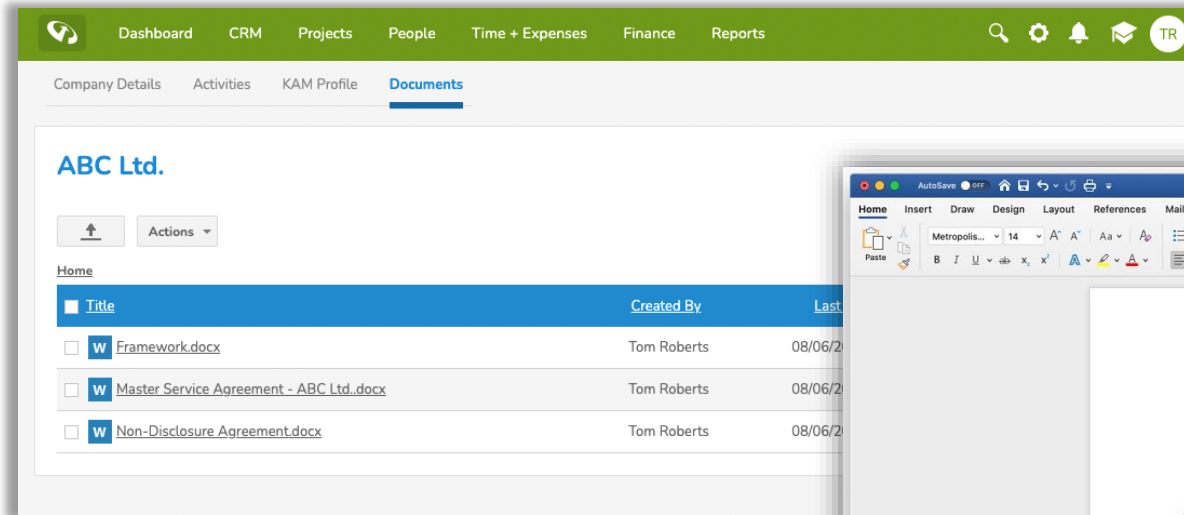
Project Financials



Reporting & Dashboards



Integrations & Add-Ons
(Documents)



Analyse and monitor the performance of your portfolios



CRM



Job Costing



Timesheets & Expenses



Resourcing & HR



Project Management



Project Financials



Reporting & Dashboards



Integrations
& Add-Ons
(Portfolios)

PORTFOLIOS

Portfolios enable you to analyse performance across a collection of projects.

What type of portfolio do you want to see?

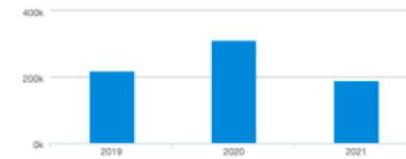
Global Region

Which global region do you want to see?

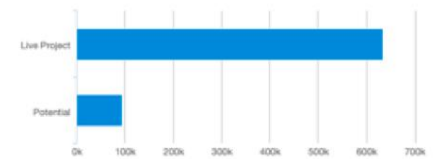
Asia-Pacific

Run Portfolio

3-YEAR INVOICING HISTORY



LIVE & PIPELINE VALUE



PROJECT VALUE BY TYPE



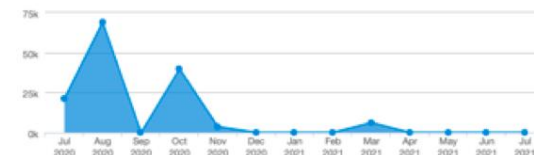
PROJECT VALUE BY SECTOR



PROJECT VALUE BY CLIENT



PROJECTS WON LAST 12 MONTHS



PORTFOLIO PIPELINE

