



Dynamics 365

For Professional Services



Service Description

ANS' Power Platform and Microsoft Dynamics 365 for Professional Services offering is purpose-built to empower modern professional services organisations to win more business, deliver client engagements with precision, and drive profitable growth at scale.

In a market where competition is fierce and client expectations are rising, firms need a unified digital platform that connects their entire lifecycle, from pursuit to project delivery to ongoing client value. Our service delivers exactly that.

By implementing a single, intelligent, end-to-end solution for managing sales pipelines, bids, project plans, resources, time/expense, and customer relationships, ANS helps your organisation eliminate silos, remove operational friction, and gain a 360° view of clients and project performance.

This service doesn't just digitise processes, it transforms the way your teams work. From dramatically improving win rates and reducing revenue leakage, to boosting utilisation and increasing customer satisfaction, ANS enables your business to operate with real-time insights, predictable execution, and complete commercial clarity.

Whether your ambition is to scale, standardise delivery, or unlock new efficiencies through automation, ANS provides the technology foundation and expert guidance to maximise value at every stage of the engagement lifecycle.

Service Features

Centralised management of leads, opportunities, bids, and proposals

Bring all sales and pursuit activity into one unified workspace. Teams gain instant visibility of pipeline health, upcoming bids, proposal status, and client interactions, enabling faster decision-making and higher win rates. Automated workflows guide teams through consistent stages, reducing admin and ensuring best-practice pursuit management every time.

Stakeholder Management

Track all stakeholders involved in a pursuit or project, from internal sponsors to client executives. Map relationships, identify influencers, and monitor engagement levels to strengthen connections and increase deal success. Powerful insights help your teams stay proactive and aligned.

Resource scheduling to match consultant skills and availability with project needs

Ensure the right people are assigned to the right work with intelligent scheduling tools that consider skillsets, certifications, capacity, and availability. Improve utilisation, reduce bench time, and maximise billable hours, while ensuring clients receive the best-fit expertise.

Project planning tools including WBS, milestones, budgets, and task tracking

Build robust, repeatable project structures with Work Breakdown Structures (WBS), governance milestones, dependency management, and task-level oversight. Teams can plan, execute, and monitor project progress with greater accuracy, supporting predictable delivery and early identification of risks.

Time and expense capture with approval workflows for accurate billing

Enable consultants to submit time and expenses easily through mobile or desktop, with automated routing for approvals. Reduce manual errors, accelerate billing cycles, and minimise revenue leakage with smart validation rules and complete audit trails.

Real-time project profitability, utilisation, and revenue forecasting dashboards

Leaders gain instant access to commercial insights, including margins, burn rates, forecasted revenue, and utilisation trends. Interactive dashboards allow proactive management rather than reactive reporting, empowering data-driven decisions to protect and grow profitability.

Integrated collaboration through Teams and SharePoint

Bring project documentation, communication, and collaboration into one seamless environment. Teams can co-author documents, manage project artefacts, maintain version control, and communicate in context, reducing duplication and accelerating delivery.

Project Management and Program Design

Support PMOs and delivery leads with structured governance templates, delivery frameworks, risk logs, RAID management, and programme oversight tools that enable consistent execution across complex portfolios.

Out-of-the-box integration with Microsoft technologies

Extend value through native connectivity with Outlook, Excel, Power BI, Azure, and more. Break down silos and streamline operations using technology your teams already know and trust.

Built-in security, compliance, and governance

Benefit from Microsoft's enterprise-grade security model, ensuring your data, processes, and client information remain protected and compliant as your business scales.

End-to-end business process and workflow automation

Automate repetitive tasks, from bid approvals to project creation to invoicing, using low-code Power Platform capabilities that drive efficiency, accuracy, and consistency.

Service Benefits

Improved win rates through better pipeline visibility and structured bid management

With clear pipeline insight and consistent pursuit governance, teams focus on the right opportunities and respond faster with higher-quality bids.

Improved stakeholder relationships

Integrated CRM and engagement tools ensure clients and stakeholders receive timely communication and proactive relationship management.

Reduced admin effort through automated workflows

Manual tasks such as approvals, data entry, and reporting are replaced with streamlined automation, allowing teams to concentrate on value-driving activities.

More predictable delivery with consistent governance

Standardised templates, workflows, and project frameworks improve delivery success, reduce overruns, and create repeatable excellence.

Greater customer satisfaction

Clients benefit from increased transparency, smoother communication, and consistent delivery, strengthening trust and long-term relationships.

Improved forecasting for revenue, capacity, and profitability

Real-time insights remove guesswork and help leaders make confident decisions about portfolio management, hiring, project viability, and growth planning.

Enhanced collaboration across sales, PMO, delivery, and finance

Shared tools and centralised data enable cross-functional alignment, reducing miscommunication and accelerating delivery.

Scalable operations and standardised ways of working

Whether you are expanding globally or increasing project volume, consistent processes ensure you scale confidently without compromising quality.

Delivers time savings and rapid time-to-value

Low-code automation, repeatable templates, and modern workflows accelerate setup, reduce handovers, and deliver quick ROI.

Leverages the latest Microsoft cloud technologies

Your organisation stays future-ready with a modern, secure, and flexible platform that continually evolves with Microsoft's roadmap.

Proactive reporting and trend analysis

Identify bottlenecks, manage risks early, and uncover new opportunities for optimisation using data-driven insights.



Why Choose ANS?

Partnering with ANS gives you more than a technology solution, you gain a strategic partner committed to helping your institution achieve long-term transformation and measurable value.

What ANS delivers:

Deep Expertise in Professional Services Transformation

ANS has a proven track record of enabling professional services firms to modernise the way they sell, deliver, and manage client engagements.

Microsoft Tier-1 Partner with Specialist Accreditation

As a long-standing Microsoft partner, we bring certified expertise across Dynamics 365, Power Platform, Azure, and Microsoft 365, ensuring your solution is implemented to the highest standard.

Rapid, Outcome-Focused Delivery

Our accelerators, templates, and best-practice frameworks help you deploy faster and see measurable value quickly without compromising quality.

Human-Led, Technology-Driven Approach

We combine consultancy expertise, industry knowledge, and deep technical capability to deliver solutions tailored to your business goals.

Ongoing Support & Continuous Improvement

Our Managed Services offering ensures your platform evolves with your needs, helping you unlock new enhancements, capabilities, and optimisation opportunities over time.

Built for Scalability & Long-Term Success

From low-code automation to enterprise governance, we ensure your technology stack grows with you and supports your strategic ambitions.