

## Prairie Capital Advisors integrates KeyedIn™ Projects with Intacct and Salesforce to provide Professional Services Automation component of integrated ERP solution.

**Client Focus:** Consultancy – Middle-Market Investment Banking, ESOP Advisory, Valuation and Financial Consulting

Prairie Capital Advisors, a professional services organization incorporated in 1996, began their professional services automation (PSA) search to accomplish three primary objectives:

- Enhanced project management functionality and fiscal visibility
- Automated time and expense tracking
- PSA integrated with Cloud-based financial/professional accounting solution (Intacct) and Salesforce CRM, for an optimally-scaled enterprise resource planning (ERP) system

By 2013, the company workload and headcount both had expanded 50%; totaling 30 resources utilized throughout Prairie Capital's five US offices.

Initially, Prairie Capital consulting and support staff utilized Excel spreadsheets and QuickBooks for time and expenses submission, invoicing and billing. To simplify the company's financial processes, they moved to Intacct, a Cloud-based financial management solution, for its real-time automation and multi-ledger accounting capabilities. The company was also utilizing another Cloud-based solution, Salesforce, as their CRM. The final function needed was the ability to schedule, review and optimize utilization of their billable resources to reach profitability goals.

Vincent DiRaddo, Director of Finance & Administration for Prairie Capital, appreciated the real-time visibility and third-party systems integration capabilities provided by Cloud-based solutions, and sought a PSA component to complete the firm's integrated enterprise resource planning (ERP) system, which would provide improved visibility into project management, resource allocation and overall profitability.

"Our rapid growth taxed our infrastructure. We were proponents of Cloud-based systems, as they ease integrations amongst best-of-breed programs of each category, and enabled us to create a tailored ERP," stated DiRaddo.

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*Vincent DiRaddo, Director of Finance & Administration, Prairie Capital*

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After thorough evaluation of six PSA products, Prairie Capital selected KeyedIn™ Projects for the solution's ability to meet their project planning and real-time visibility needs, as well as integrations with both Intacct and Salesforce.

KeyedIn Project's consultancy led implementation and ongoing Cloud-based system fit the firm's specific organizational environment. "Being a seamlessly integrated Intacct recommended solution, that also supports Salesforce, had KeyedIn Projects well-suited for us," confirmed DiRaddo.

“ Additionally, KeyedIn Projects provides historical information that will be beneficial when planning subsequent projects and responding to RFP's. All documented details of past projects will remain available to us, as they're needed. That unto itself is a major profitability contributor. ”

Vincent DiRaddo, Director of Finance & Administration,  
Prairie Capital

## KeyedIn Projects' impact

During the evaluation discussions between Prairie Capital and KeyedIn, visibility of projects was of primary focus. Expansion beyond time and expense tracking was needed. With the increased project workload, resources were stretched thin, meaning optimizing consultant's billable hours became an ongoing priority, as did focused profit analysis per project. Organization-wide visibility and reporting of all current and planned projects provided real time information to drive educated decisions.

"Our substantial growth posed operational challenges that we believed Cloud-based automation could overcome. Significant to our success has been having our most capable consultant's expertise on corresponding client projects. We needed to prevent resource bottlenecks, and have the ability to track project progression and financial status in real-time," emphasized DiRaddo.

KeyedIn Projects provided this critical step between opportunities found in Salesforce and the financial functions of Intacct. Seamless integration of these solutions enabled us to build a best of breed ERP solution scaled to our exact needs. Having complete visibility and detailed analysis throughout each project provided accurate status reporting, along with improved collaboration, which led to optimized profitability.

"Additionally, KeyedIn Projects provides historical information that will be beneficial when planning subsequent projects and responding to RFP's. All documented details of past projects will remain available to us, as they're needed. That unto itself is a major profitability contributor," summarized DiRaddo.



Part of the KeyedIn Solutions Business Portfolio



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