



## Top global professional services firm transforms business development with project service automation

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*Neil Benson, Director of Customer Engagement,  
KPMG Australia*



Whether you're talking about accelerating innovation, enabling a mobile workforce, or driving value from data assets, digital transformation is the way forward. But before businesses can take the next step, they need to target the right areas and tools for change with the right resources—and that's where Microsoft Alliance Partner KPMG comes in. KPMG member firms helps organizations worldwide enhance business processes and help improve customer engagement with products like Microsoft Dynamics 365. KPMG has started using Dynamics 365 for Project Service Automation alongside Dynamics 365 for Sales with the goal of gaining timely insight into past projects and future business opportunities.

## Eliminating business bottlenecks

KPMG is a global network of professional firms providing Audit, Tax, and Advisory services. It is made up of many member firms that provide a similar array of services yet operate independently, with their own separate business practices and diverse areas of expertise. The structure gives the company an international presence with a strong local focus.

As part of its advisory services, KPMG Australia helps organizations implement customer relationship management (CRM) and enterprise resource planning (ERP) solutions.

## Automating processes and improving productivity

Neil Benson, who has been recognized as a Microsoft Most Valuable Professional in business solutions since 2010, decided that Microsoft Dynamics 365 for Project Service Automation was the best choice for transforming business development processes in the Australian firm. Using Project Service Automation alongside their existing CRM tools, KPMG Australia's business development managers would be able to easily profile global projects and resources including case studies and technology specialists. The capabilities would enable KPMG Australia to not only sell and staff future projects, but also identify and close gaps to target new markets.

KPMG Australia kicked off a year-long pilot project using Microsoft Dynamics 365 for Project Service Automation in its CRM and ERP practices, and began seeing immediate benefits. KPMG Australia uses Dynamics 365 for Project Service Automation to support sales and generate case studies for marketing and business development. Benson says, "It's really easy to get a biography for each of the staff resources along with a snapshot of all the relevant projects that you would want to include in a proposal."

The new process is a significant break from the old way of generating proposals. Now, instead of spending hours sending emails and waiting days for a reply, proposal writers sign in to Project Service Automation to quickly query projects by industry, size, date, number of users, types of technologies, and more. Then, they automatically generate a project snapshot to include in a proposal. "With Dynamics 365 for Project Service Automation, it takes 15 minutes to find reference information, "It's a massive time-saver."

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**Customer Name:** KPMG Australia  
**Industry:** Professional services  
**Country or Region:** Australia  
**Customer Website:** [www.kpmg.com.au](http://www.kpmg.com.au)  
**Employee Size:** 188,982 worldwide

### Customer Profile

KPMG is a global network of professional firms providing Audit, Tax and Advisory services across a wide range of industries, government, and not-for-profit sectors. KPMG operates in 152 countries with more than 189,000 staff. KPMG in Australia is represented by 6,700 people, including more than 400 partners, and 13 offices.

## Gaining insights and winning business with better talent management

The new solution is helping KPMG Australia improve productivity. In addition to finding information for project success stories, business developers can search for staff with specialized skill sets and certifications. The capability paid off in a recent project in London, England. “The UK firms London team was looking worldwide for a solution architect who had a lot of Dynamics CRM Online experience and some Salesforce experience,” explains Benson. “I used Dynamics 365 for Project Service Automation to find the right person in a couple of minutes.”

### Targeting new opportunities

In addition to locating personnel with specific skills, KPMG Australia is using Project Service Automation for gap analysis in both competencies and market penetration. The company can identify which employees need to update certifications or acquire new ones. With better access to data, KPMG Australia can more easily build assets needed to pursue new, industry-specific solutions in areas such as education. Benson says, “We’re winning and growing in those areas where we have an industry solution.” For example, the firm has created a student engagement platform based on Dynamics

365 augmented with Azure Machine Learning. Benson says the solution is “fast to implement and transforms the way that the university engages with students.”

Benson anticipates expanding Project Service Automation into more areas at KPMG Australia to improve customer engagement. Customer engagement is a primary focal point. “We have a rolling roadmap of industries that we are building solutions for, including higher education, case management in the public sector, and local citizen engagement,” he concludes. “I can see the demand, and I can see that Dynamics 365 for Project Automation is there to support it. It’s a good product—impressive in its breadth and capability.”

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## Products

- Microsoft Dynamics 365 for Project Service Automation