



Digital transformation guide to  
**accelerate your  
professional services  
organisation's potential**

Effortlessly streamline timesheets, scheduling, and resourcing. Maximise utilisation, optimise capacity planning, and enhance stakeholder management. Gain crystal-clear visibility, make confident, data-driven decisions, and drive sustainable profitability.



## Introduction

# Is this guide for you?

This guide is for CFOs and managing directors of mid-sized Australian professional services firms who are responsible for strategy and growth.

If you want to:

- Streamline operations - Reduce admin work in timesheets, scheduling, and resource management.
- Maximise efficiency - Improve capacity planning to increase profitability.
- Unify systems - Get a 360° view of your business in one platform.
- Drive digital transformation - Use smart, integrated technology to scale faster.
- Strengthen decision-making - Improve transparency and stakeholder management.

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## Navigating economic uncertainty

# How professional services firms can build resilience

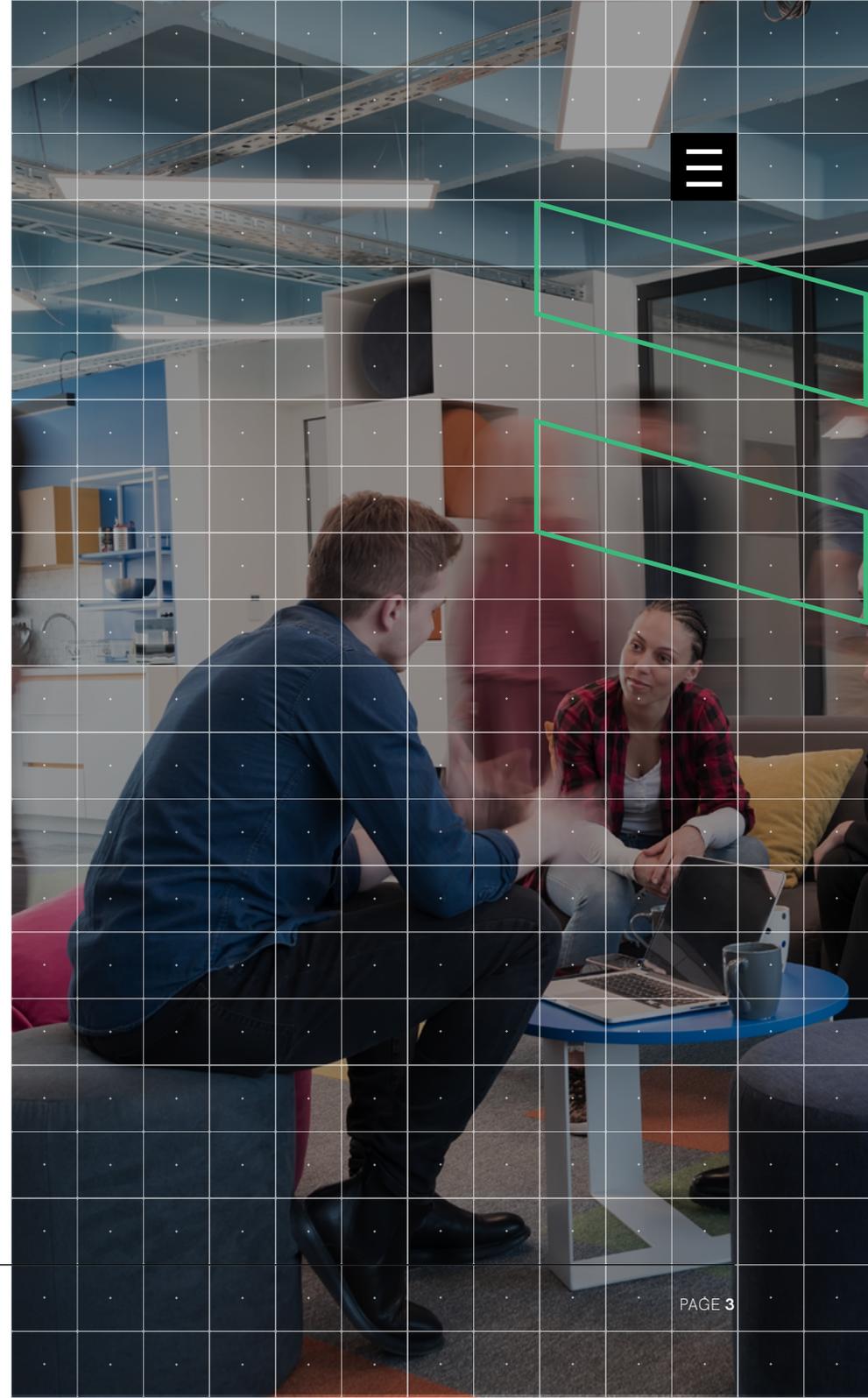
In today's rapidly evolving business landscape, efficiency and agility are no longer optional—they are essential for survival. [A recent survey](#) found that two-thirds of professionals in legal, tax, accounting, and anti-fraud sectors believe AI could save them up to four hours per week, adding up to approximately 200 hours annually. This staggering potential for efficiency gains underscores the growing need for digital transformation in professional services.

As a financial leader or managing director in Australia's professional services sector, you're navigating unprecedented change. The traditional pillars of success—expertise, relationships, and reputation—remain crucial, but the rules of engagement are shifting dramatically.

Your firm faces pressure from multiple directions:

- Clients expect greater transparency, sophisticated services, and faster turnaround times.
- Staff demand flexible working arrangements without productivity trade-offs.
- Regulatory requirements continue to tighten, increasing compliance complexity.
- Competition is intensifying from both established firms and digital-first newcomers.

Maintaining your firm's sterling reputation and profitability in this environment requires innovation, adaptability, and strategic foresight. To stay ahead, firms must streamline operations, leverage technology, and consistently deliver superior client value—or risk being left behind.



# Why digital transformation matters now

For Australian professional services firms, digital transformation isn't just about implementing new technology—it's about building long-term competitive advantages and maximising profitability in an increasingly demanding market.

## Key business challenges & solutions



### Client value & revenue growth

**Challenge:**

Clients expect real-time transparency, predictable pricing, and instant access to project information. They are increasingly choosing firms that provide digital-first experiences and data-driven insights to meet their evolving expectations.

**Impact on your firm:**

Without modern digital capabilities, firms risk losing clients to competitors who offer greater transparency and responsiveness. This shift is happening rapidly, making adaptation essential for survival.



### Operational efficiency & profitability

**Challenge:**

Rising costs, talent shortages, and increasing competition are squeezing margins across the professional services sector. Manual processes and disconnected systems create inefficiencies that firms can no longer afford.

**Impact on your firm:**

Every day spent using inefficient systems leads to lost revenue, lower staff satisfaction, and missed growth opportunities. The cost of maintaining outdated workflows now outweighs the investment in digital transformation.



### Risk management & compliance

**Challenge:**

Regulatory requirements are becoming more stringent, while cybersecurity threats continue to evolve in complexity. Relying on manual compliance processes is no longer secure, scalable, or sustainable.

**Impact on your firm:**

Without robust digital systems, your firm faces greater exposure to compliance breaches, data security risks, and financial or reputational damage. A proactive, digital-first approach is critical to mitigating these threats.



### Market positioning & growth

**Challenge:**

New global competitors and boutique firms with digital-first business models are disrupting the professional services industry. These agile players operate with lower overheads and deliver services more efficiently.

**Impact on your firm:**

Maintaining traditional operating models puts your market share at risk. Digital capabilities are no longer a competitive advantage, they are now a minimum requirement for relevance.



### Strategic agility

**Challenge:**

The pace of change is accelerating. Firms must have real-time insights and the ability to pivot quickly in response to market shifts, new opportunities, and emerging risks.

**Impact on your firm:**

Without integrated digital systems, your firm's ability to make informed, strategic decisions is severely limited. A lack of visibility across operations will hinder adaptability and long-term success.

**Takeaway:** Digital transformation isn't just an upgrade—it's a necessity for long-term success.

## Microsoft Dynamics 365 Business Central for professional services

# Transforming professional services with Microsoft Dynamics 365 Business Central & Nexon

Microsoft Dynamics 365 Business Central delivers the strategic control and financial visibility needed to drive profitable growth. By unifying your operations in a single platform, it transforms how you manage your firm, make decisions confidently, drive profitability, and deliver value to clients.



### Strategic financial control

#### Executive dashboards & reporting

- Real-time visibility of key performance indicators
- Customisable CFO workspace
- With drill-down capabilities
- Automated month-end closing processes
- Advanced cash flow forecasting and management
- Multi-entity consolidation for group reporting

#### Project financial management

- Accurate project profitability tracking
- Real-time work in progress (WIP) management
- Automated revenue recognition
- Project budget versus actual monitoring
- Multi-currency capability for international clients



### Operational excellence

#### Resource optimisation

- Real-time utilisation tracking across teams
- Capacity planning and forecasting
- Skills-based resource allocation
- Bench time minimisation
- Leave management integration

#### Time & expense management

- Streamlined timesheet processes
- Mobile time and expense entry
- Automated approval workflows
- Expense policy compliance
- Integration with payroll systems



### Strategic growth enablement

#### Client value management

- Client profitability analysis
- Service line performance tracking
- Opportunity pipeline management
- Client engagement monitoring
- Value-based pricing support

#### Business intelligence

- Power BI integration for advanced analytics
- Trend analysis and forecasting
- Competitive benchmark tracking
- Market opportunity identification
- Data-driven decision support



### Risk mitigation & compliance

#### Governance & control

- Role-based access control
- Comprehensive audit trails
- Automated compliance reporting
- Document management and retention
- Secure client data handling



### Microsoft ecosystem integration

#### Seamless integration

- Native integration with Microsoft 365 (Outlook, Teams, Excel)
- Centralised document management with SharePoint
- Custom automation and reporting with power platform
- Enterprise-grade security and scalability with azure cloud
- Unified data and workflows across the Microsoft ecosystem



# More is possible with AI

In today's fast-paced business environment, financial leaders need real-time visibility, operational efficiency, and proactive risk management. Copilot for Microsoft Dynamics 365 Business Central is more than just an AI-powered assistant—it's a game-changer for firms looking to enhance productivity and secure long-term growth.

Imagine cutting admin time by 200 hours per year while improving accuracy. Copilot for Microsoft Dynamics 365 Business Central brings AI-powered efficiency to financial tracking, forecasting, and compliance, helping firms automate routine tasks, improve decision-making, and boost productivity.

AI-driven automation, intelligent data analysis, and personalised recommendations empower decision-makers to act with confidence and precision.

To fully unlock Copilot's potential, businesses must seamlessly integrate it with their existing, operational frameworks, and knowledge libraries to capture and apply best practices effectively. With Business Central and Copilot, your firm gains the agility and intelligence needed to drive efficiency, innovation, and sustainable growth: all from a single, unified platform.

## Copilot for Microsoft Dynamics 365 Business Central



### Automating routine tasks

Copilot can assist with tasks like invoicing, expense tracking, and time entries, freeing up your time to focus on high-level strategy rather than day-to-day administration.



### Improving decision-making

With ai-driven insights, copilot helps you analyse financial data, forecast cash flow, and identify risks or opportunities, enabling you to make better-informed decisions faster.



### Enhancing collaboration

Copilot makes it easier for you to collaborate across teams by simplifying communication and data sharing, ensuring smoother project execution and client engagements.



### Boosting productivity

Integrated with Microsoft teams and outlook, copilot offers real-time suggestions and reminders, helping you stay organised and on top of your work, boosting your productivity.



### Strengthening client relationships

Copilot helps you engage clients with automated follow-ups and personalised communication, enhancing customer satisfaction and driving long-term growth.

**One platform. Total control. Smarter decisions.**

# Unlock efficiency & growth with PracticePoint

Running a professional services firm can often mean juggling multiple systems for billing, job costing, scheduling, document management, and client communication. However, running disconnected applications leads to inefficiencies, compliance risks, lost time, and ultimately lost revenue.

PracticePoint by Nexon helps eliminate these challenges by bringing everything into a single, AI-powered platform—designed to seamlessly integrate with your firm’s workflows while leveraging the familiar Microsoft interface, tools, and navigation.

With real-time dashboards, workflow automation, and built-in compliance measures, you will streamline operations, optimise resources, and make data-driven decisions with confidence—all from one connected platform.

## Why firms choose PracticePoint

Experience a unified, automated solution that streamlines every aspect of your operations—from project kick-off to client onboarding, job costing, resource allocation, document management, and financial reporting. Built on Microsoft Dynamics 365, PracticePoint leverages the full Microsoft cloud platform, enabling your team to work efficiently using familiar tools like Teams, Outlook and SharePoint.



### One unified system

Eliminate manual data entry across multiple tools. Centralise billing, job tracking, resource planning, and document management into one seamless workflow.



### Real-time visibility

Up-to-date dashboards provide real-time financial and operational insights—eliminating the need for manual reporting.



### Maximise profitability

Capture every billable hour, optimise resources, and automate invoicing at key milestones to maximise revenue and cash flow.



### AI-powered forecasting

Predict cash flow, identify risks, and optimise operational costs with AI-driven insights—helping you plan smarter and reduce uncertainty.



### Secure & compliant

Ensure audit readiness and regulatory compliance with centralised document storage, automated alerts, and built-in tracking.



### Future-ready

No matter the size of your client base, PracticePoint seamlessly scales to meet your firm’s evolving needs. Our platform ensures long-term efficiency, adapts to future growth.

## Partnering for success

# Leveraging trusted expertise to implement a modern Business Central platform

### Embrace digital transformation to stay competitive

As a financial leader, you see firsthand how outdated processes and fragmented systems impact your firm's efficiency, profitability, and growth. While your teams struggle with disconnected data and manual workarounds, competitors are moving ahead with integrated solutions that deliver real-time insights, improved decision-making, and stronger financial performance.

The need for a unified, efficient platform is clear—but implementation is often a challenge. Many professional services firms recognise the value of Microsoft Dynamics 365 Business Central but lack the internal resources or expertise to deploy it effectively.

Many Australian firms have faced this challenge before. Past technology implementations may have exceeded budgets, failed to meet expectations, or disrupted business operations. These experiences highlight a crucial truth: successful transformation is not just about selecting the right software, it requires specialised expertise and a proven implementation strategy.

### Why the right partner matters

A trusted technology partner can bridge this gap, acting as an extension of your team. With the right expertise and implementation experience, they ensure that your Business Central deployment is seamless, efficient, and aligned with your firm's strategic goals.

With the right partner by your side, your firm can innovate, scale, and grow—without compromising day-to-day operations.

# Your trusted partner in digital transformation

With a reliable partner by your side, you can confidently navigate the complexities of digital transformation, leveraging their expertise to achieve financial resilience and operational excellence. Together, you can turn your vision into a thriving, future-proofed reality.

## Partnering with Nexon for success

Nexon is a leading digital consulting and managed services provider, dedicated to helping Australian organisations drive productivity, business continuity, and long-term success. With a comprehensive suite of integrated, end-to-end digital solutions, Nexon enables firms like yours to achieve their digital transformation goals and maintain a competitive edge in a dynamic market.

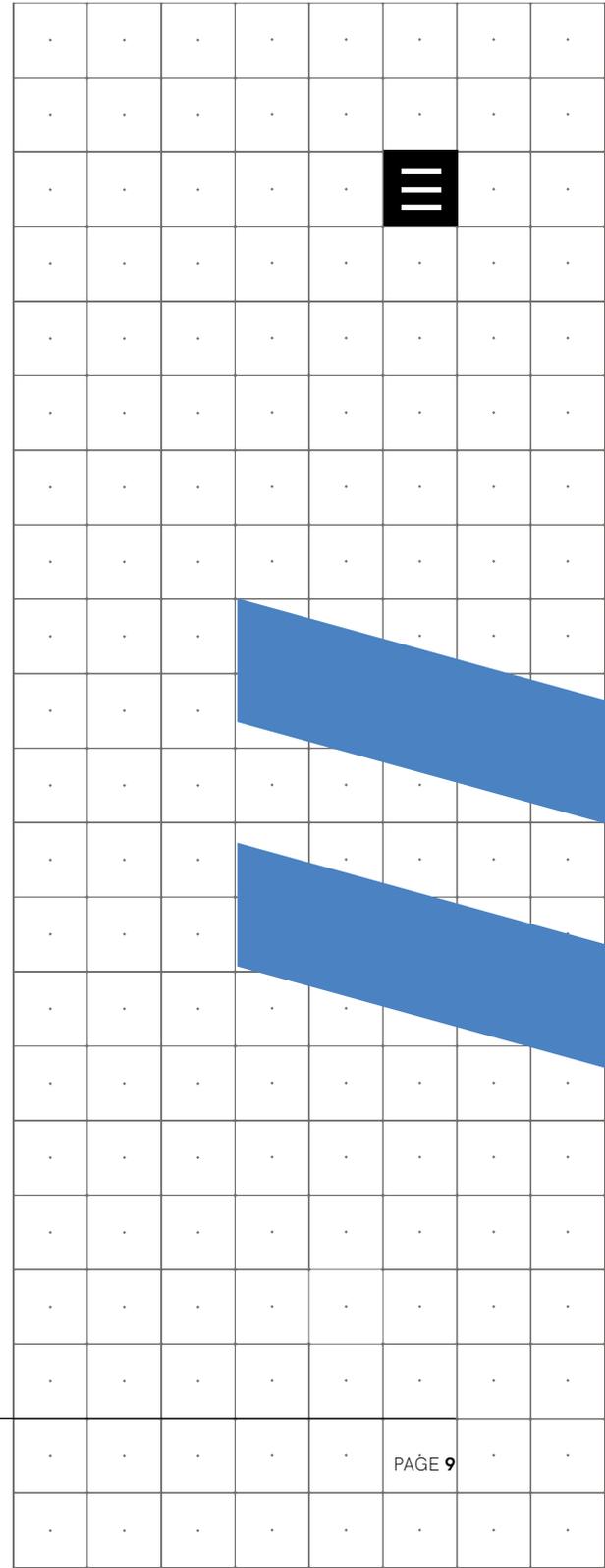
## Why choose Nexon?

Selecting the right partner is critical for a successful transformation. Nexon is your dedicated Microsoft Solutions partner, holding all six Microsoft Solutions Partner designations and offering unparalleled expertise in:

<b>Industry expertise</b>	Deep understanding of professional services challenges	Tailored solutions designed to address your unique business needs
<b>Comprehensive suite</b>	Accredited Microsoft Solutions Partner across the entire Microsoft technology stack	Integrated approach covering modern workplace, cloud, security, and networks
<b>Client-centric approach</b>	Responsive, competent, and transparent service delivery	Flexible commercial models designed to share risk and drive success
<b>Proven results</b>	Track record of successful migrations for Australian professional services firms	Tangible outcomes backed by case studies and client testimonials

By combining deep expertise in digital solutions with an industry-leading client care model, Nexon helps professional services firms move from complexity to clarity; transforming digital overwhelm into digital empowerment.

With Nexon, your firm is positioned for a dynamic, cloud-enabled future.



# Accelerate your digital transformation

As you prepare to transform your professional services firm, Nexon is ready to guide you through every stage—from initial assessment to full implementation. With our tailored solutions and expert support, we help firms like yours achieve their goals, streamline operations, and accelerate growth.

## Take action: book your complimentary assessment

Start your journey with a no-obligation needs assessment designed to provide clarity and strategic direction. During this focused session, our experts will help you:

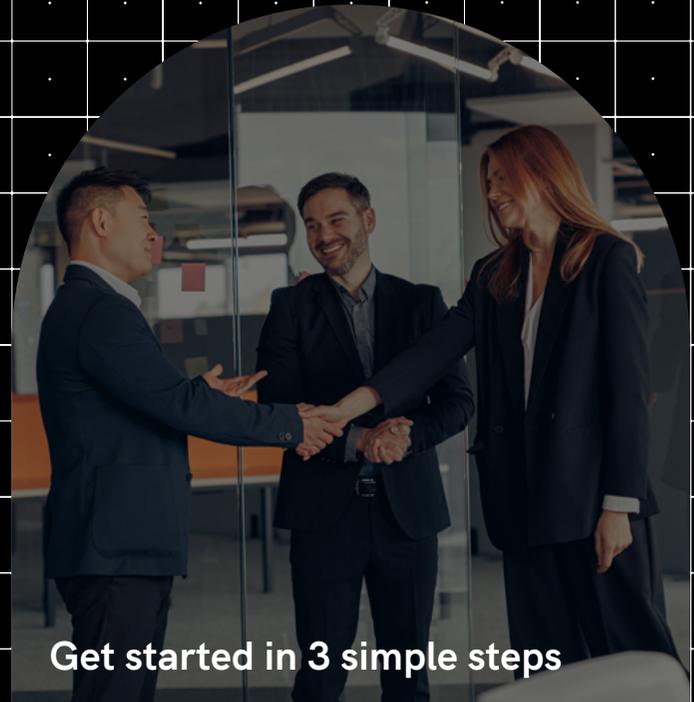
- Assess your current IT landscape and identify opportunities for improvement
- Explore tailored Microsoft Dynamics 365 Business Central implementations
- Develop a clear, actionable strategy to manage your digital transformation with confidence

Our experienced consultants will work closely with you to understand your unique challenges and goals, providing insights and practical recommendations to help you make informed, data-driven decisions.

## Ready to look to the future?

Take the first step towards a more efficient, profitable, and future-ready organisation. Join the leading Australian firms already transforming their operations with Nexon.

Limited availability—secure your complimentary strategy session today.



## Get started in 3 simple steps

**1. Visit:** [www.nexon.com.au/practicepoint](http://www.nexon.com.au/practicepoint)

**2. Book your session:** Our team will promptly arrange a convenient time for your complimentary assessment.

**3. Prepare for transformation:** Come ready to discuss your challenges, goals, and vision for the future—and let's map out your digital transformation journey together.