

# CHALLENGES OF A SERVICES COMPANY

## Technology is disrupting every industry, including professional services businesses.

Whether you are in marketing, engineering, IT or consulting, technology is enabling smaller players to complete on a global scale.

As competition in your market increases you have to either innovate and increase value or reduce price and lose margin.

Combined with the ability for your customers to research your company across multiple channels online, its become a buyers market that is looking for an amazing experience for their dollar spent.

Your team don't want to work the standard 9 to 5 from the office either. They want to be let loose to work their own hours on the their own terms. They expect to have the tools available to them to collaborate from anywhere in the world, anytime.

On top of this is the usual challenges to scale - increasing overheads and decreasing productivity that continues to eat away at your margin.

But technology can be harnessed to create a leaner, more efficient and highly profitable company as well.

With resource optimisation platforms you can have unprecedented visibility over your teams schedule of work and maximise billable utilisation.

Through workflow automation you can keep your people highly productive while reducing mundane activities

Technology also unshackles your most important asset, your team, from the office, reducing costs while giving them the freedom to live on purpose without compromising productivity.



## **ABOUT SME**

## SCOTT GELLATLY FOUNDER



Scott developed his reputation as world leading cloud technology implementer and small business enabler in his previous businesses, Bollo Empire and TrackZEN. He's now taking his roots in enterprise architecture and project management, and bringing them to his passion for helping Founders to scale their business.

## **OUR CORE VALUES**

#### **Simple, Elegant Systems**

We boil down complexity into it's core principles and rebuild a customer's business into simple steps. This translates into our customer experience (how we work with our clients and suppliers) - keep it simple, intuitive and easy to follow.

#### **Visibility & Openness**

For our clients, we crack open a business so the founder can gain real insights. For our team, we celebrate our wins, own our mistakes and stay critical of our actions. Staying open and honest with each other, we grow together as a team.

#### **Highly Organised**

The principle of what we deliver to our clients is the confidence that we will drive their projects forward to achieve their outcomes. This requires us to be highly organised, task and deadline oriented, but with a big picture view.

#### **Excellent Communication**

No amount of automation or systemisation can replace human connection and clear communication. 99% of The World's problems, including our clients and our own, can be solved with clear and constant communication.

#### **Challenge & Innovate**

We challenge pre-conceptions and status quo with a critical mind to create innovation in our clients businesses and our own business. We celebrate and embrace constant change and improvement.

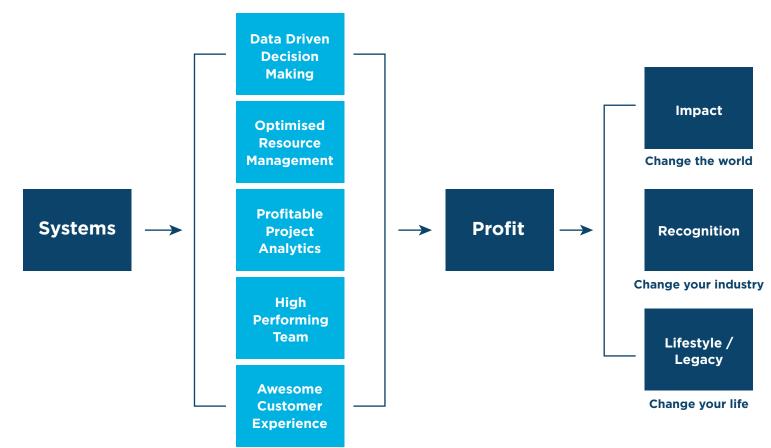
#### **Live on Purpose**

It's not about work/life balance
- it's just about life. Working our
passions, integrated to our lifestyle
creates an engaged, creative and
high performing team that empowers
Founders to do the same.



## **OUR MISSION**

To help professional services based businesses to become more profitable, scalable and disruptive through digital transformation. Through our 5 pillar framework for digital transformation we help Founders to generate more profit that in turn can be used to create a lasting impact on the world, their industry and their legacy.







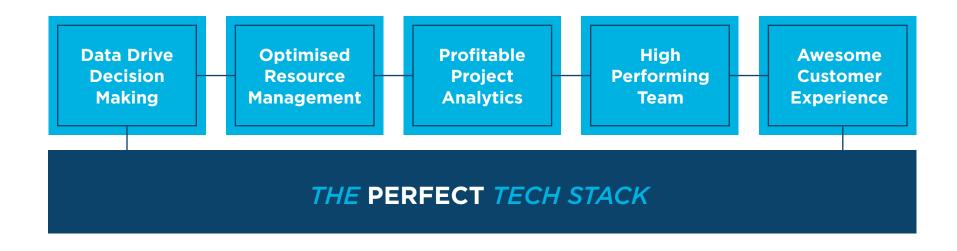
"We came to SME after two previous attempts at implementing a project management system for our agency. I cannot speak highly enough about Scott and his team. We've now got ourselves an excellent solution which is doing exactly what we needed it to do. There was lots of really clever thinking on the architecture side of things followed up with lots of really effective development work."

~ David Lawrence, Rocket Agency



### THE SME FRAMEWORK

The SME digital transformation framework has been developed from years of working with services based businesses to help them scale. Crafting a services business ourselves, we know what capabilities and metrics you need to scale.



## Data Driven Decision Making

Track the most important metrics your agency needs to scale so you can make smarter, more agile decisions.

## **Optimised Resource Management**

Plan, optimise and track utilisation of your most important resource - your people - to maximise profitability company wide.

## **Profitable Project Analytics**

Keep track of profitability on all projects and contracts with advanced cost and billing analysis.

## **High Performing Teams**

Keep the team organised, on task and highly efficient with workflow automation and collaboration tools.

#### Awesome Customer Experience

Gain and retain clients with a consistent, cohesive and beautiful customer workflow.



## THE JOURNEY TO SCALE



#### 1. DISCOVERY

We begin with Discovery - a deep dive into your business to understand your journey, what makes your business unique and your goals.

Then we assess your current technology stack against your goals and our framework to determine where the opportunities are to improve profitability and scalability.

Together we'll calculate the Return on Investment (ROI) from the opportunity to give us a firm basis to move forward.



#### 2. BUSINESS CASE

After Discovery we'll have the information we need to create a tailored technology architecture for your business.

We'll formalise the results of the Discovery and architecture into a Business Case that links the solution to your goals and the expected return on investment.

Together we'll present the case to your board or senior leadership team to approve the Digital Transformation



#### 3. PROGRAM PROJECT PLAN

In the first stage of project delivery we will coordinate with our supplier network to finalise pricing, timelines and resource requirements such that we can develop a programme plan. The programme plan will articulate how the transformation will take place, the expectations and responsibilities for all involved parties and a change management plan - how your team will be taken on the journey.

Together we'll establish a steering committee and regular meeting schedule to govern the execution of the project.



#### 4. PROJECT DELIVERY

Where the 'rubber meets the road', your dedicated Project Manager will drive the schedule of work, track the budget and report to you and the fortnightly on progress.

Expert software vendors and consultants may be engaged in this process to deliver their respective platforms, integrate them together and build the reporting and workflow outcomes necessary to deliver on the SME Framework.

Together we'll test the results, train the team and coordinate go-live with the team.



#### 5. SUPPORT AND OPTIMISE

The most important part of the project is in achieving the outcomes we set out in the initial business case.

To do this, a rigorous support network will be put in place to make sure the team have the training and resources they need to succeed with your new technology stack.

Together we'll monitor the results of the project and continuously tweak and improve your system.



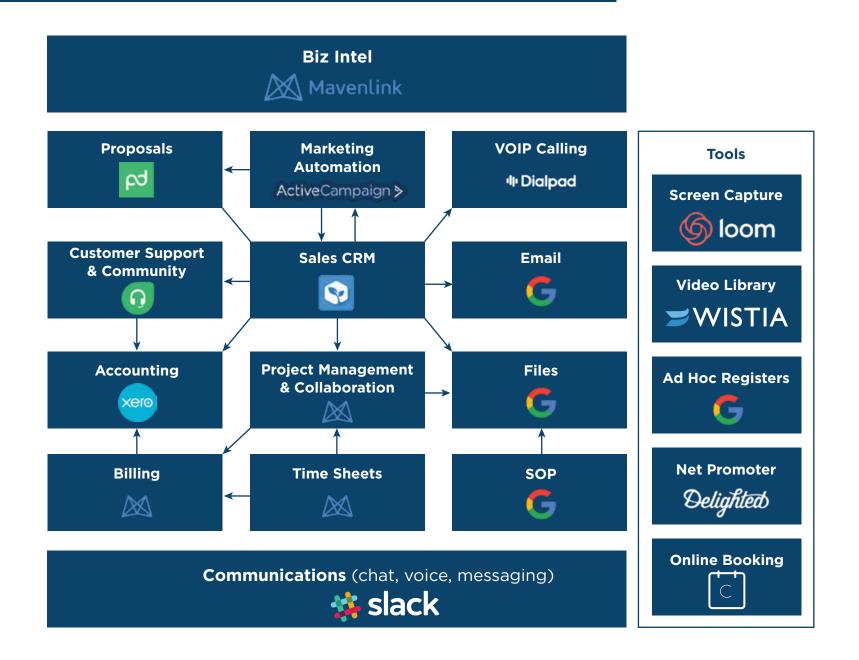
# PERFECT TECH STACKS FOR PROFITABLE & SCALABLE PROJECTS

Our framework is underpinned by the perfect, fully integrated technology stack that provides reporting across all of the key metrics your services business needs to monitor to keep clients happy, staff productive and margins high.

We've crafted **2 versions** to suit businesses of different size and requirements. It's a sliding scale - so your solution might be one, the other or something in between.



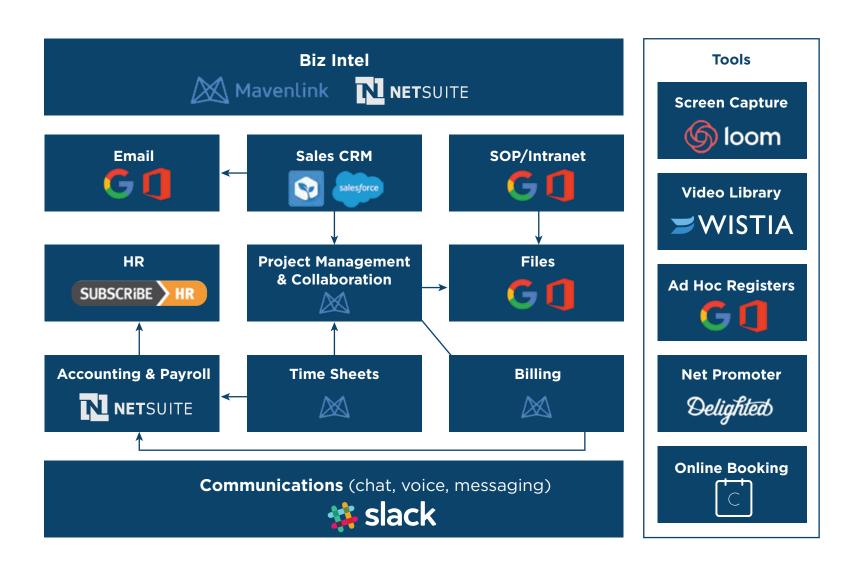
## **SMALL BUSINESS TECH STACK**





## MID MARKET TECH STACK







# WANT HELP MAINTAINING PROFITABILITY WHILE SCALING YOUR BUSINESS?

Book a call with SME today to have a **complementary** strategy & ROI analysis for your business

**Book your Strategy Call Now** 





Thanks to partnering with Scott and SME our members have been able to implement systems to improve profit through increasing revenue and reducing labour as a percentage of revenue - a material impact on profit. They have also been able to step out of the day to day running of the business, which is a fantastic result. Scott and the team never let us down.

~ Paul Higgins, Founder Build Live Give & SME Partner



