

# Project Lite



Cloud9 Insight

The new project management tool for SMBs brought to you by Cloud9 Insight.

**Price: One-off implementation cost of just £3,995 and monthly subscription fees starting at £199pcm for up to 3 users.**

- Do you need a new or a better project management tool?
- Do you need a project tool that integrates seamlessly with your Sales CRM & Microsoft 365 solutions?
- Do you need a project management tool that has everything you need without the features you would not use?
- Do you need a cost effective, easy to use, simple to implement project tool?

**Introducing Project Lite - brought to you by Cloud9 Insight. Everything you need at a fraction of the cost, quickly, and with zero complexity.**

Are you an SMB with project management needs but without the budget or time to invest in enterprise Project Management tools?

From our experience of working with over 850 SMBs, we have identified that sometimes SMBs need a project management tool that is truly tailored to their specific needs. Big enough to do what you need but small enough not to cost the earth to buy and implement.

Many of our clients have their customer, sales and project delivery data in different places, meaning their teams are not communicating and lack a single view. Project Lite eradicates this issue as it collates data from different sources into one place no matter what CRM you are using.

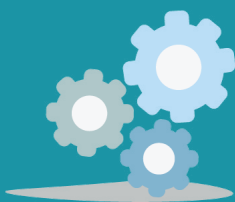
## What's included in the set-up project:

- Project kick-off call
- Live configuration time
- User and security set-up
- Live reporting configuration session
- System testing
- Pre-UAT training
- UAT support and up to 3 hours of fixes
- Data import from spreadsheets
- System admin training
- End user training



# So why Cloud9 Project Lite?

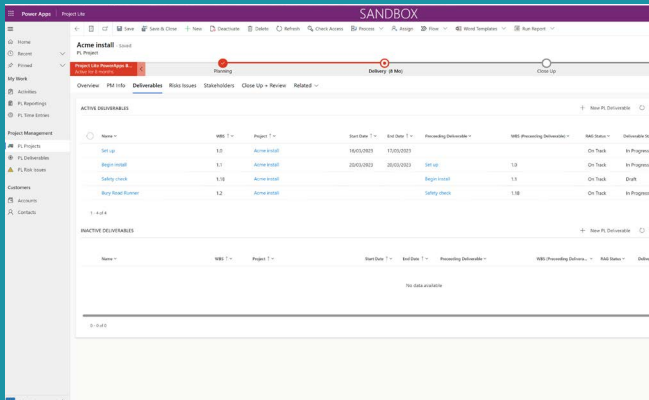
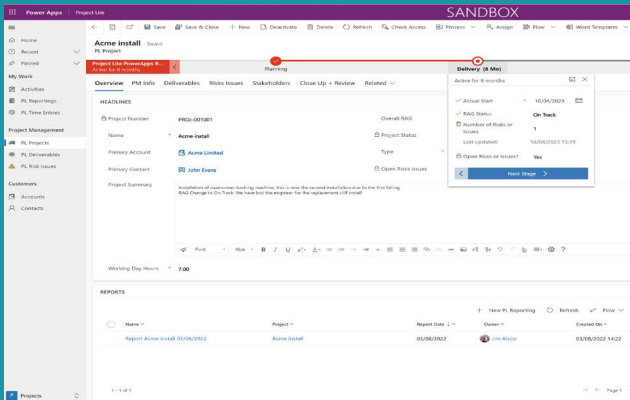
- Simply put, whilst Cloud9 Project Lite is not the only smaller scale project management tool available, it is the only tool available that you can fully embed with Microsoft Dynamics or Microsoft Power Apps.
- All your data is one place – regardless of how you use your current CRM – you will always be using the same dataset.
- You can be up and running with Project Lite in just seven days.



Project Lite is a simple to use variant of the bigger project management tools that are available on the market – it still incorporates all the key functionality that you will need but at a fraction of the cost. Vitally Project Lite can also be used as a stand-alone project management tool with the rest of the Microsoft Dynamics Modules.

## Key features and benefits:

- All project data is secured and stored on resilient Microsoft infrastructure.
- Accessible from the cloud, accessible anywhere - no servers required.
- Simplification – if you do not want to use all the features of Project Lite, the service can be simplified to only those that you need.
- Each project can be broken down into distinct deliverables that can be planned and tracked in isolation.
- Key dates, milestones and risks are trackable.
- Effort can be easily recorded against deliverables.
- A straightforward project management tool that allows quick weekly summary reporting.



# Project Lite includes all these key features as standard:

- Project management including deliverable workstream tracking
- Account and Contact management
- Project risk and issue management
- Resource and time entry management
- Outlook integration for email and appointment management
- Activity timeline management
- Standard automation for templating repeatable projects

# If you are a Dynamics 365 user then Project Lite Plus has these additional features:

- Resource skills and scheduling board
- Order and Invoice management for Project financials
- Micosoft Teams integration for linked chats
- Sharepoint integration for document storage

# What does Project Lite include?

## 1. Single View

Project Lite lives inside your Dynamics 365 Sales CRM or Power Platform service, meaning no integration and a seamless data flow from lead through to project delivery and completion.

## 2. Finance Tracking\*

In the Dynamics version, you can create and track financial records such as Orders or Invoices that relate to your Project.

## 3. Workstreams

Projects can be broken down to manageable chunks called Deliverables. Theses Deliverable workstreams provide analysis between forecasted and actual time and cost.

## 4. Tasks

Tasks are the individual actions that deliver each Deliverable. Tasks can be assigned to specific resources who can record the actual time worked against them.

## 5. Risks

Project Lite offers simple risk flagging and management including RAG status and track the tasks taken to mitigate a risk or resolve an issue.

## 6. Resources

A resource skills and scheduling board is available with the Dynamics version\*

## 7. Timesheets\*\*

Time entries can be submitted by resources online or via a mobile app. Time entries are reviewed individually or in bulk by the project manager ready for approval. A connection with Clockify is available to simplify time tracking\*\*.

## 8. Reporting

Dashboards and visual reporting are available across the solution and are easy to tweak and maintain by the user. Reports include RAG overview, estimated versus actual time and cost tracking.

## 9. Microsoft

As a native Dynamics 365 solution, Project Lite offers all the great Microsoft integrations including:

- Active Directory for single sign-on.
- Outlook for email and appointment tracking.
- Microsoft Teams integration for linked chats and conversations.\*

## 10. Documents\*

The Dynamics 365 version has native SharePoint and Teams integration allowing a single and secure area for document storage and collaboration.

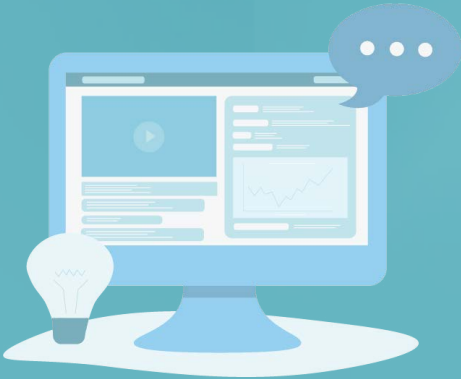
## 11. Automation

Project Lite will also work for you offering automation to increase efficiency. With Power Platform backing the service, virtually any task can be automated, and the most common scenarios include:

- Template Projects to speed up the planning and task allocation.
- Template Document to support proposals, change requests and sign-off.
- Workflows to notify resources and clients of project progression.

\*Available with the Dynamics version

\*\*Requires a Clockify subscription





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