



CASE STUDY

AccountAbility Uses
ProjectManager
to Drive Internal
Efficiency & VAR
Success

Overview

Global consulting firm AccountAbility was unimpressed with lightweight tools like Microsoft Planner and Asana. They needed a flexible project management solution to support their role as an Acumatica value-added reseller (VAR) and implementation partner. ProjectManager offers multiple project views that support high-level planning, granular task management and the ability to keep organized from kickoff through delivery.

Key Challenges

- Concurrent complex projects were suffering from overly simplified software
- Poor flexibility, collaboration and file management limited scalability

ProjectManager's Solutions

- Multiple project views give teams the flexibility to run different types of work
- Centralized project files and communications help teams stay in sync

Standout Features



Gantt charts



Sheet view



Kanban board



Unlimited file storage



Global search

Customer Profile



Location

San Antonio, Texas, USA



Industry

Financial consulting and ERP implementation management



Website

accountability.us.com



Size

~10 employees

The Need for One Software to Support All Business Needs

AccountAbility offers financial consulting and enterprise resource planning (ERP) management. It manages complex client projects while running its own internal operations, so it requires project management software that could address both sides of its business.

Taylor Comeau, director of operations, tested products as varied as Microsoft Planner and Asana, but neither had the versatility, usability and feature set to keep its projects organized from kickoff through delivery. That's when she discovered ProjectManager, award-winning project and portfolio management software that can serve dual needs, delivering client-facing implementations while improving internal operational efficiency.

On top of that, AccountAbility is a valued-added reseller (VAR) for Acumatica, an ERP platform that helps businesses automate and manage core functions like finance, CRM, distribution and project accounting. Through this relationship, they found ProjectManager, which offers a dedicated project management application to Acumatica's integrated modules and adds features for project accounting, budgeting and job cost tracking.



How AccountAbility Uses ProjectManager's Diverse Tools



ProjectManager has become central to AccountAbility's operations by providing versatility, centralized documentation and operational alignment. Having multiple project views supports high-level planning and granular task management.

By providing a common work platform where they could create subtasks, add notes, attach files and comments at the task level, AccountAbility streamlined communication and facilitated greater productivity.

While these tools helped with AccountAbility's internal business processes, they also improved its external operation. That is, they could sell ProjectManager as part of Acumatica's ecosystem, reinforcing client credibility.

ProjectManager's Acumatica Integration Provides Ongoing Value

As part of the ProjectManager VAR program, partners receive complimentary access to the platform for internal use. This allows teams to experience the tool firsthand, improve their own operations and demonstrate its value to customers with confidence.

Most organizations need both an ERP and project management software to cover everything. ProjectManager integrates directly into Acumatica, eliminating double entry, data silos and reporting headaches.

ProjectManager does this with visual planning tools, such as Gantt charts and real-time project and portfolio dashboards that plan, track and present timelines, tasks and dependencies with clarity.



Users also get real-time visibility inside Acumatica. Executives and finance leaders can see project status, progress and variances without having to leave Acumatica—keeping both systems aligned and accurate with bi-directional sync. That means projects, tasks, customs, resources and actuals flow automatically between Acumatica and ProjectManager.

Add live tracking of costs, time and scope and it's easy to see why ProjectManager and Acumatica are a great match. Teams can stay on top of key project metrics from one integrated solution. This ensures accountability and control at every level.

Follow AccountAbility's lead and put ProjectManager to work in your business and extend the impact through partnership.

Start a free trial at projectmanager.com or contact sales@projectmanager.com to learn more about our VAR program.