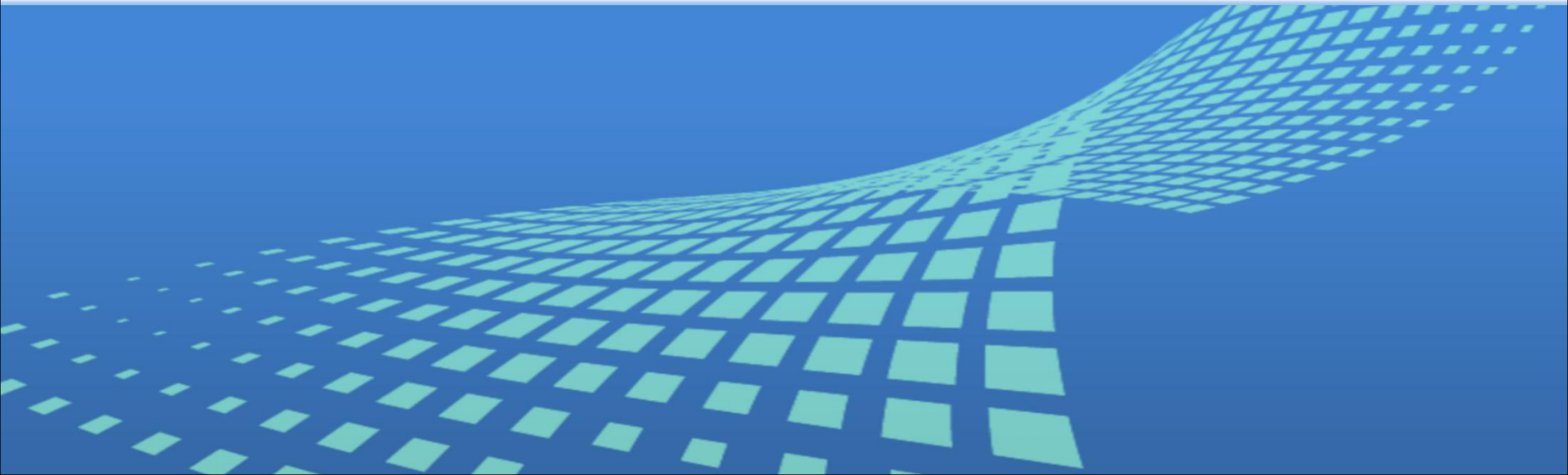


PRACTICE MANAGEMENT TECHNOLOGY CAN HELP

OSOURCE INDIA PVT. LTD.

IT SOLUTIONS | BUSINESS PROCESS OUTSOURCING | CONSULTING

Osource (India) Private Limited – An ISO 9001:2008 and SAS 70 Certified Organization



PRACTICE MANAGEMENT OVERVIEW

CA PRACTICE LANDSCAPE IN INDIA

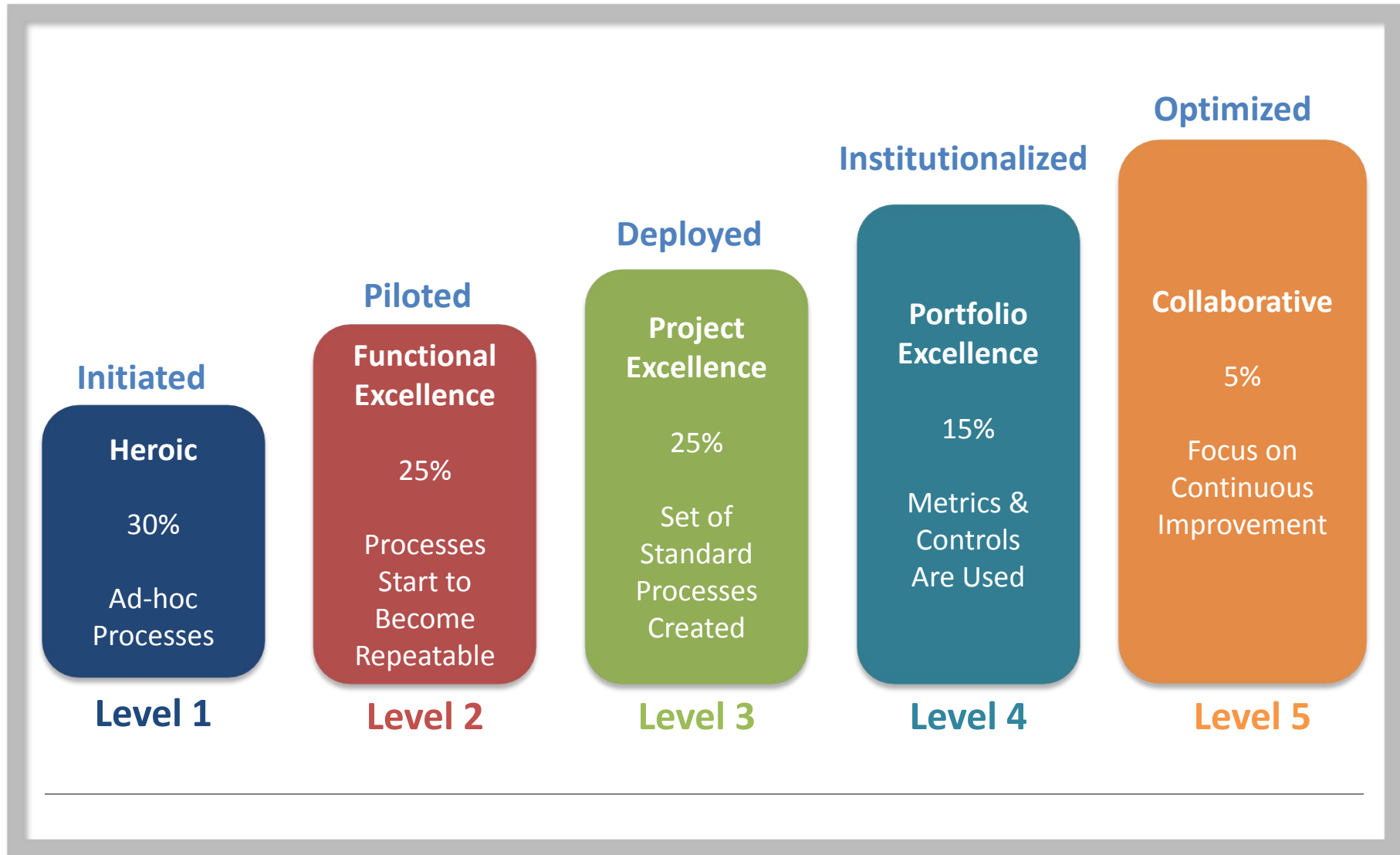
CA Firms with only 1-2 CAs →

95-98%

CA's in Practice (50%)
110,000

Indian CAs
230,000

SERVICE MATURITY MODEL – FIVE LEVELS



WHY MATURITY MATTERS

	Initiated Level 1	Piloted Level 2	Deployed Level 3	Institutionalized Level 4	Optimized Level 5
Revenue Growth	-2.2%	4.3%	7.9%	20.0%	26.5%
Annual Revenue per Billable Consultant(K)	\$142	\$185	\$208	\$229	\$250
Annual Revenue per Employee (K)	\$115	\$150	\$174	\$194	\$225
Billable Utilization	66.3%	69.1%	69.3%	73.6%	76.3%
EBITDA	3.2%	13.1%	16.1%	19.3%	41.2%
PSA is Integrated	19.4%	33.3%	35.7%	73.3%	71.4%
CRM Integrated	18.1%	31.8%	19.7%	50.0%	61.1%

TECHNOLOGY ABSORPTION BY INDIAN CA FRATERNITY

NETWORKING, SEARCH, MAILS & STORAGE – GREAT ACCEPTANCE



INTEGRATED SOFTWARE USAGE FOR PRACTICE MANAGEMENT – LOW USAGE

COMPARISON OF COMPANIES WITH OR WITHOUT PSA

Professional Service Automation – PSA Software

Key Performance Indicators (KPI)	Without PSA	Non Integrated PSA	Integrated PSA
Concurrent Projects Managed by PM	4.46	4.54	5.22
A Standardized Delivery Methodology is Used	63.8%	68.9%	71.5%
Projects Delivered on Time	74.8%	76.8%	80.0%
Average Project Overrun	8.9%	7.9%	6.8%
Project Margin for Fixed Price Projects	33.0%	33.2%	36.3%
Billable Utilization	63.1%	68.0%	70.1%
Annual Revenue per Billable Consultant	\$179,000	\$195,000	\$215,000

KEY CHALLENGES IN MANUAL PROCESSES

- 1 Manual & Error Prone Process
- 2 Low Efficiency – Low Resource Utilisation
- 3 Lack of Information about Billability
- 4 Absence of CRM Data
- 5 Disjointed HR Database
- 6 Billable Time Spent in Non-Billable Activity



WHY PRACTICE MANAGEMENT



1 2 3 OF PRACTICE AUTOMATION



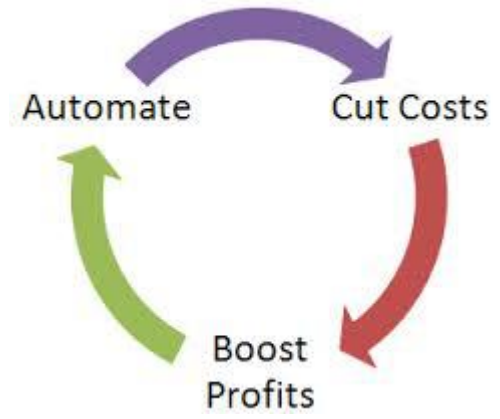
More Business - CRM



Profitable Projects - PM



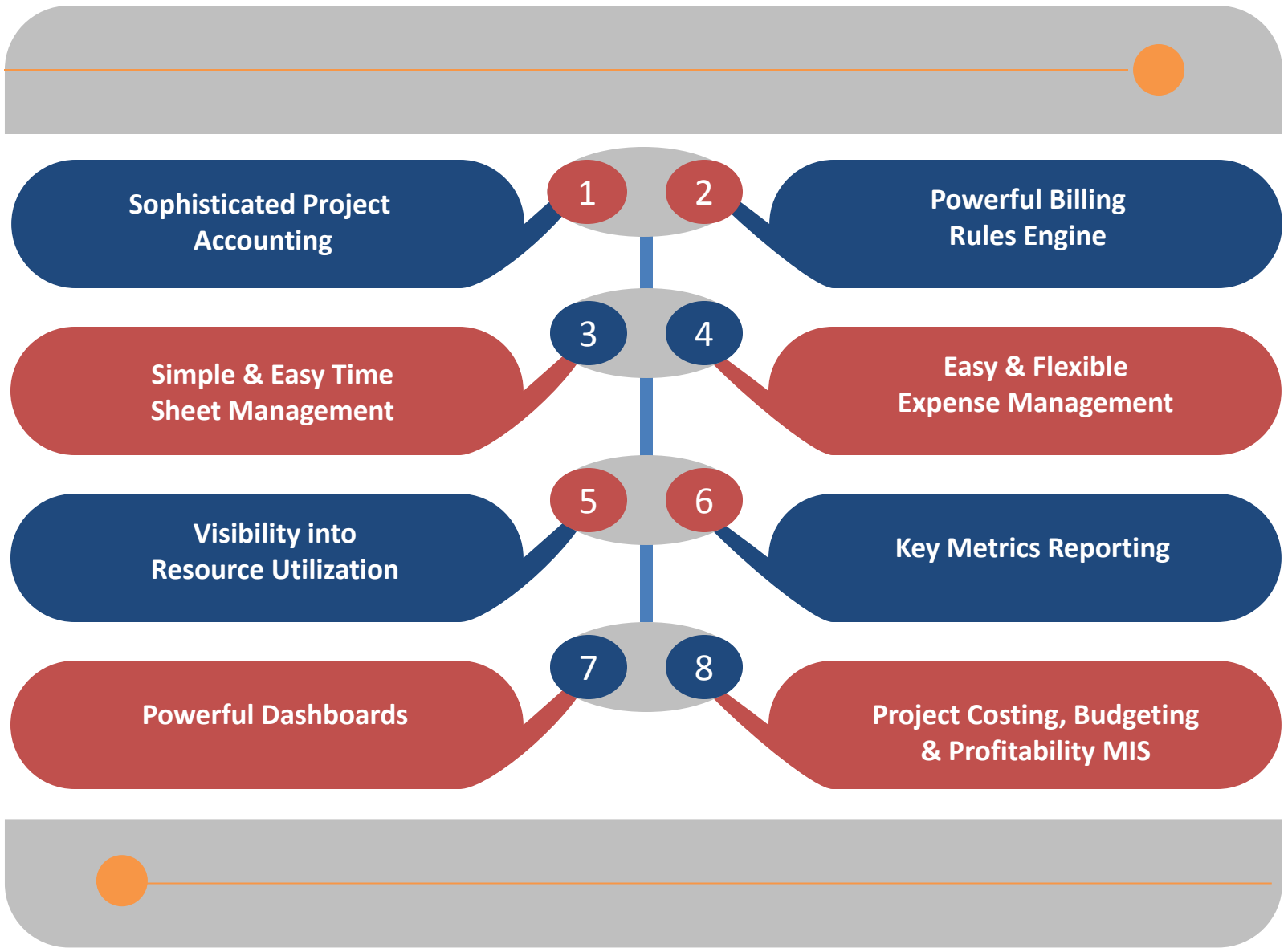
Enhanced Margins - FA



BENEFITS OF CRM



BENEFITS OF PROJECT MANAGEMENT (PM) SYSTEM



BENEFITS OF INTEGRATED FINANCIAL ACCOUNTING (FA) SYSTEM



PRACTICE MANAGEMENT SYSTEM FEATURES

ONEX ERP



ONEX
CRM Module



ONEX
HRMS Module



ONEX
Project Module



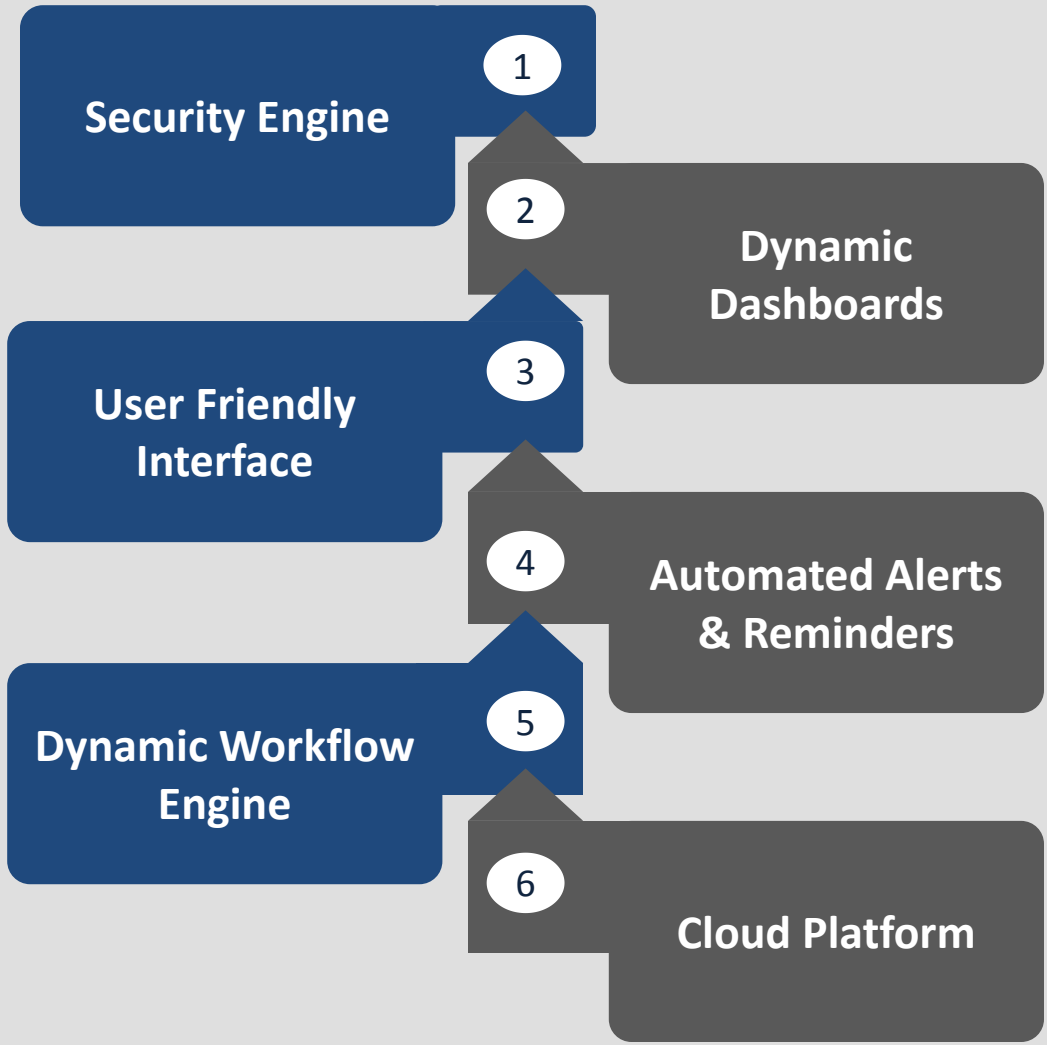
ONEX
DMS Module



ONEX
Financial Accounting Module



CORE SYSTEM FEATURES



PRACTISE MANAGEMENT OVERVIEW

➔ Fully Integrated ERP

➔ Prospect Tracking

➔ Project / Job Setup

➔ Time Management

➔ Expense Management

➔ Project Monitoring / Tacking

➔ Complete Accounting Platform


➔ Project Statistics & Reports

SCREEN SHOTS

ONEX – ERP HOME PAGE

ENTERPRISE SETUP CUSTOMER RELATIONSHIP PROJECT MANAGEMENT HUMAN RESOURCES ACCOUNTS SUPPORT

Account ▶ Contact ▶ Pipeline ▶ Activities ▶ Campaign ▶ MIS & Reports ▶



**Manage complexity;
improve performance**

Who We Are

Osorce is one of the leading providers of outsourcing and technology solutions. Osorce blends its deep process expertise and best practices with optimum technology framework to deliver a comprehensive solution. We Believe that our activity is very important because it influences greatly on business development. Owing to strong focus on coupling business processes & technology platforms, Osorce has been one of the first organizations to have offered platform-based outsourcing solutions. [more...](#)

Policies

- ▶ Attendance Policy
- ▶ Employee On-Boarding Policy
- ▶ Equal Opportunities Policy
- ▶ Health Safety Policy
- ▶ Late Sitting Reimbursement & Compoff Policy
- ▶ Leave Policy
- ▶ Separation Termination Policy

[more...](#)

Inside

- ▶ Timesheet
- ▶ Helpdesk
- ▶ Search people
- ▶ Self profile

[more...](#)

News and Events

- ▶ Afternoon Article
- ▶ Times Ascent Article
- ▶ HRA News Magazine - SaaS
- ▶ 4Ps Business & Marketing - BPO
- ▶ Express Hospitality - Cost Challenges & Outsourcing
- ▶ Express Hospitality - Time Office Challenges
- ▶ Hospitality Biz India - Project Accounting

[more...](#)

Knowledge Bank

- ▶ Database Naming Convention
- ▶ Design Guideline
- ▶ Dot Net Application Code Review Checklist

[more...](#)

SELF DASHBOARD

KPI	YTD	LM	LW
Utilization Percentage	0	0	0
Non Submission Ratio	12.10	27.78	100
Task Delivery Overdue Ratio	0	0	0
Overrun Ratio	0	0	0

MY ACTIVITY

PENDING APPROVAL LIST

Sr.No	Type	Pending

PENDING ACTION LIST

Sr.No	Type	Pending
1	Pipeline without scheduled activity	72

BIRTHDAYS

Loc	Dep	Name	Send
TO	Software	Surendra Suresh Lambe	
TO	Software	Madhuri Deepak Dhadve	
TO	Operat	Vaibhav Bhoje	
UJ	HR SS	Niraj Madhavji Solanki	

SERVICE AWARDS

Loc	Dep	Name	Service Year
SH	Audit	Rajshree Mane	2

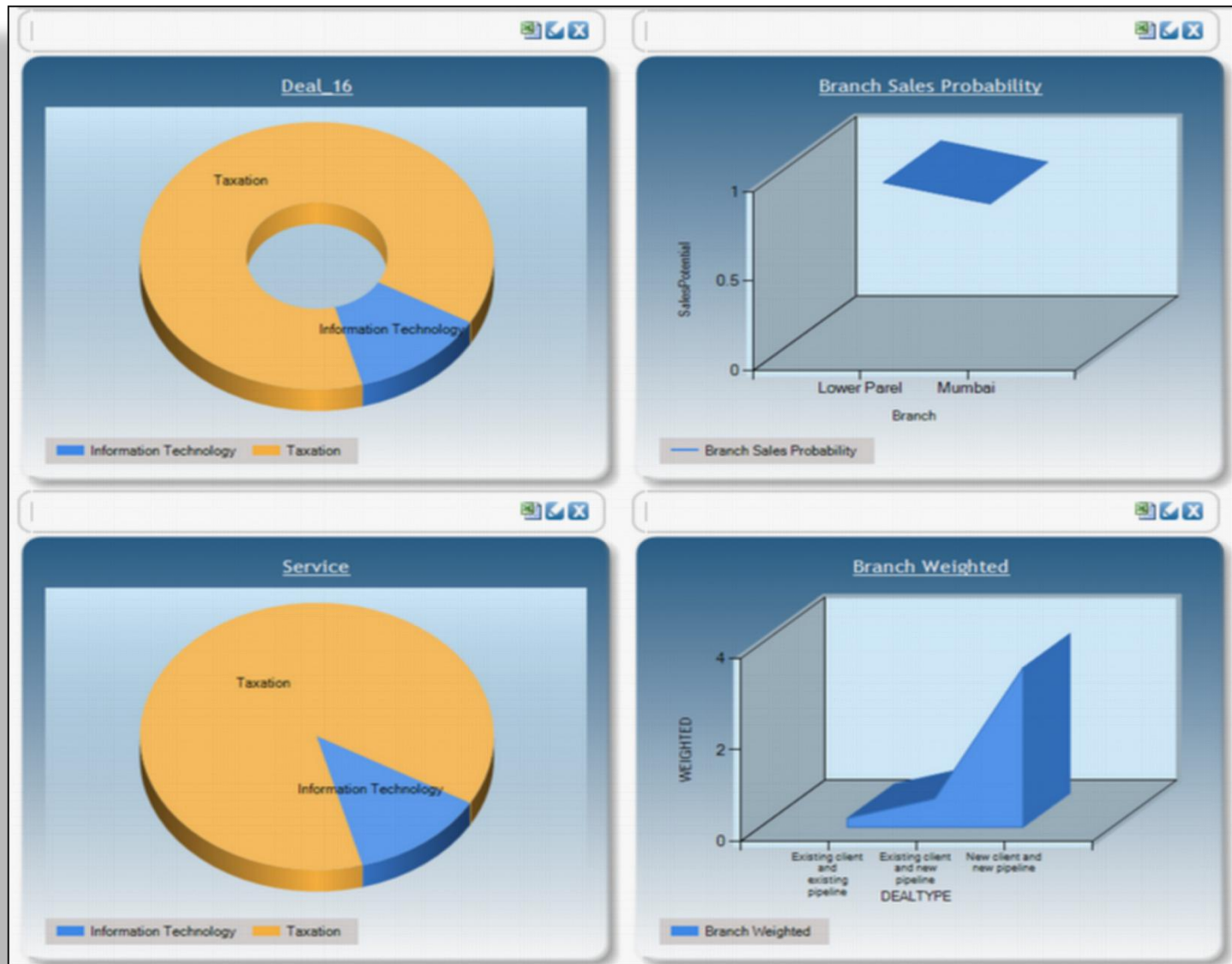
MY ASSETS

CALENDAR

◀ Nov 2014 ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22

REAL TIME DASHBOARDS



CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM



CUSTOMER RELATIONSHIP MANAGEMENT

Account Details: Save | Save & Close | Back

Account Code : Account : *

Entity Type : * Business Group :

Account Type : * Status : *

Business Description :

Account Creation

Account Creation

Business:

Industry : * Sector : *

Market : * Sub-Market : *

Country : * Region:

TurnOver : Total Employee :

Contacts | Addresses | Details | Attachments | Pipeline | Activities | Outward Referral | Audit Trail

Contact Details Add Existing Contact | Add New

No.	Contact Code	Contact Person	Direct Line	Board Line	Mobile No.	Designation	Department	Primary Contact for Account	Delete

Contact Creation

Pipeline Updation

Commercial

Budgeted Cost Probability

Premium/Discount % Premium/Discount Value

Proposed Pipeline Value Proposed Pipeline Value(INR)

Weighted (Proposed Pipeline Value) Weighted (Proposed Pipeline Value) (INR)

Pipeline Status *

Pipeline Contacts | Project Milestone | Budget | Billing Milestone | Subcontract | Attachments | Activities | Audit Trail

Billing Milestone

Edit	Milestone Code	Milestone	Milestone Start Date	Milestone End Date	Budget Amount	Billing Amount*	Billing Remarks *	Save	Collection Status

Grand Total of Billing Amount :

Pipeline Mapping

PROJECT MANAGEMENT SYSTEM



PROJECT MANAGEMENT

Job Master		Admin Option	Save & Submit	Save For Rework	Back
Job Code *	Aud-201411-000146	Job Creation Date *	03/11/2014		
Job Name *	Audit-2014-2015	Year Of Execution	2014-2015		
Billing Entity *	Osource India	Account *	Demo Account		
Service Line *	Audit	Branch *	Mumbai		
Operational Manager *	Sonia Ashutosh Salvi	Operational Partner *	Sagar Yadav		
Relational Partner/Manager	Sonia Ashutosh Salvi	Support Manager	Type Name		
Market *	International	Sub Market *	Investment Banking		
Industry *	Automobile	Sector *	Undefined		
Reference Job	<input type="radio"/> Yes <input checked="" type="radio"/> No	Referring Firm	--Select--		
Referring country	--Select--	Referring Partner	--Select--		
Remarks		Job Description	asd		
Billing Currency *	India Rupee	Chargeable Rate *	Designation		
Start Date *	03/11/2014	End Date			
Is Parent/Child	<input checked="" type="radio"/> Parent <input type="radio"/> Child	Parent Job			
Job Status	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Complete	Job Type	<input checked="" type="radio"/> Chargeable <input type="radio"/> Non Chargeable		
Job Charge Out Cost Fee	12000	Pipeline Charge Out Cost Fee	12000		
Job OPE	10000	Pipeline OPE	10000		
Job Fee	10000	Pipeline Fee	10000		
Premium/Discount Value	2000	Premium/Discount %	16.67		

Admin Option Save & Submit Save For Rework Back

PROJECT MANAGEMENT

Holiday	Weekend	Today	Submitted	Approved	Rejected
Leave	Out Door Duty		Comp Off		

Select Date Range : [Previous Week](#) [Next Week](#)

Date	Ch	Non-Ch	Total	Copy / Paste	Select
17/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
18/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
19/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
20/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
21/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
22/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
23/Nov/2014	00.00	00.00	00.00	Copy / Paste	<input type="checkbox"/>
Total	0	0	0		

Date : 22/Nov/2014 Total Time : 00.00 Day : Saturday
 Time In : Time Out : Total Time :

Account Name	Job	Hrs	Mins	Edit	Delete
nil	nil	0	0		

Account Name* : Hrs* : Min:

Job* :

Milestone* :

Activity Group* :

Activity* :

Narration :

Option : Comp Off Out Door Duty

Rejection Remarks:

Expense

Expense Head* :

Expense* :

Expense Date* :

Expense Description* :

Currency Type* :

Forex Rate* :

Exp.Amt* (INR) :

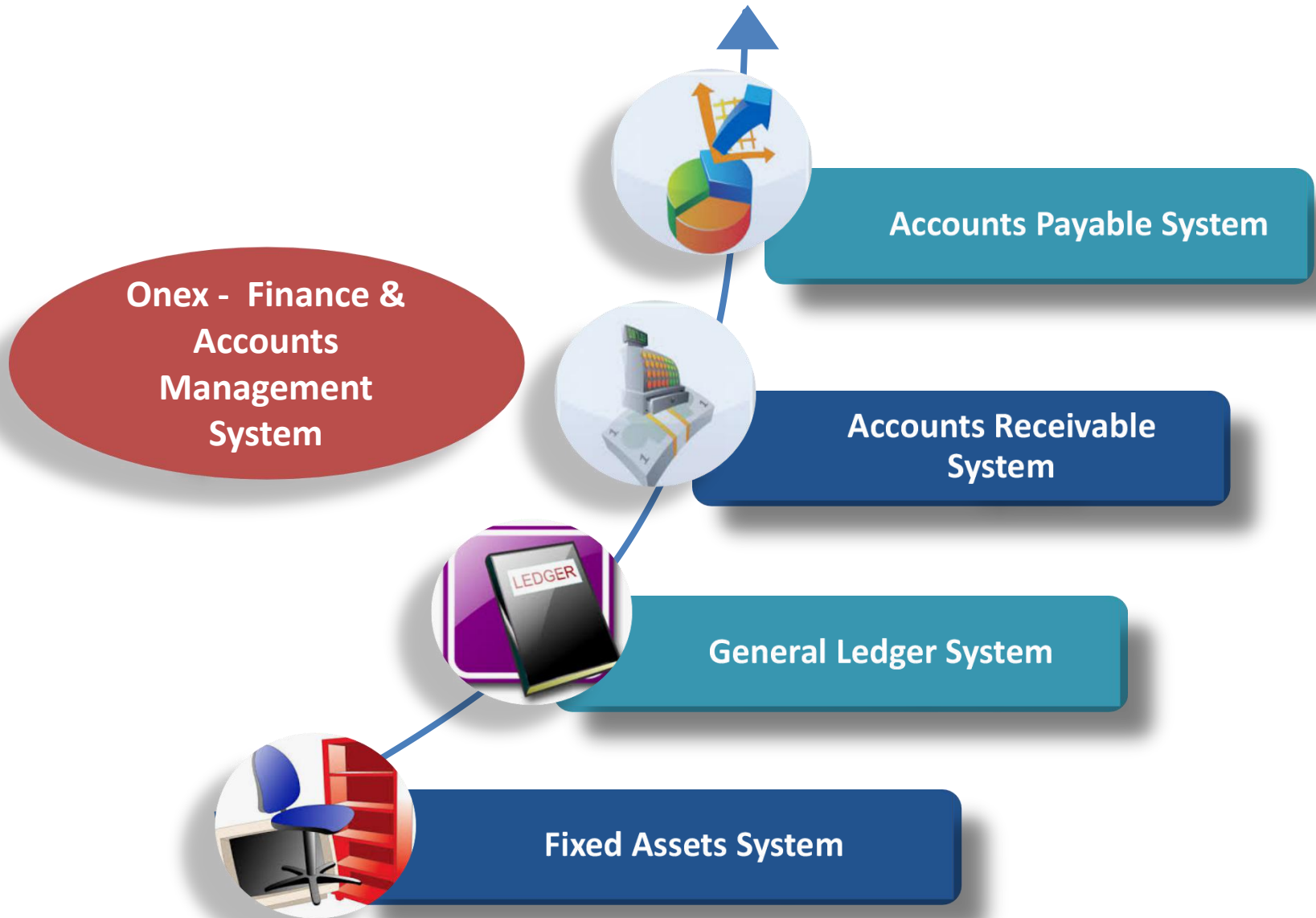
Exp.Amt(Rs)* :

Payment Mode* :

Supporting Attached

No file chosen

FINANCE & ACCOUNTS MANAGEMENT SYSTEM



HUMAN RESOURCE MANAGEMENT SYSTEM

Employee Profile

- Employee Details
- Employee Profile View
- Employee Profile Search
- Employee Personal File



Recruitment

- Budget
- Requisition
- Bio-Data Bank
- Talent Consultant Management
- Contract Letter Generation



Life Cycle

- Joining & Induction
- Confirmation
- Mid Year Changes
- Performance Management
- Learning & Development
- Exit/Separation

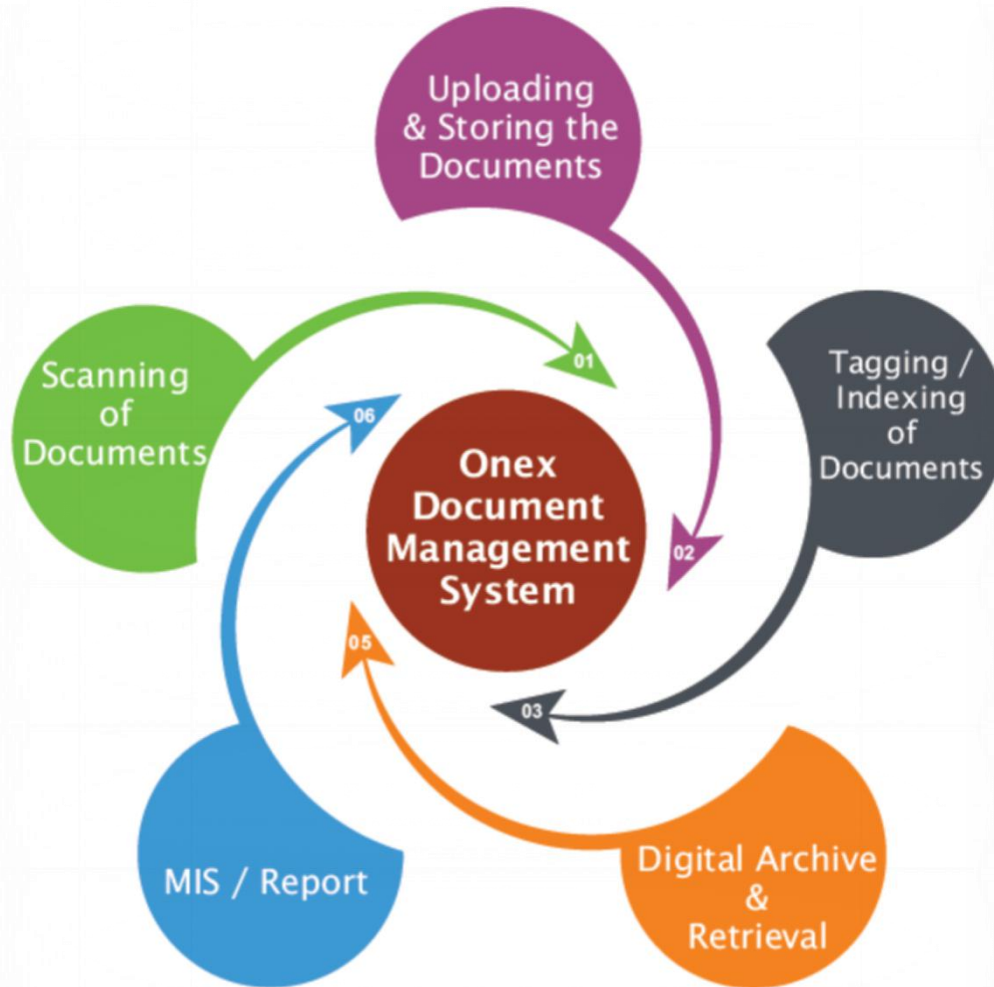


Employee Self Service

- Leave
- Attendance
- Benefits Reimbursement
- Travel Management
- Business Expense Reimbursement



DOCUMENT MANAGEMENT SYSTEM



Salient Features

Intelligent Metadata (Tagging)

Dynamic Workflow (Case Management)

Email & Alert Notification

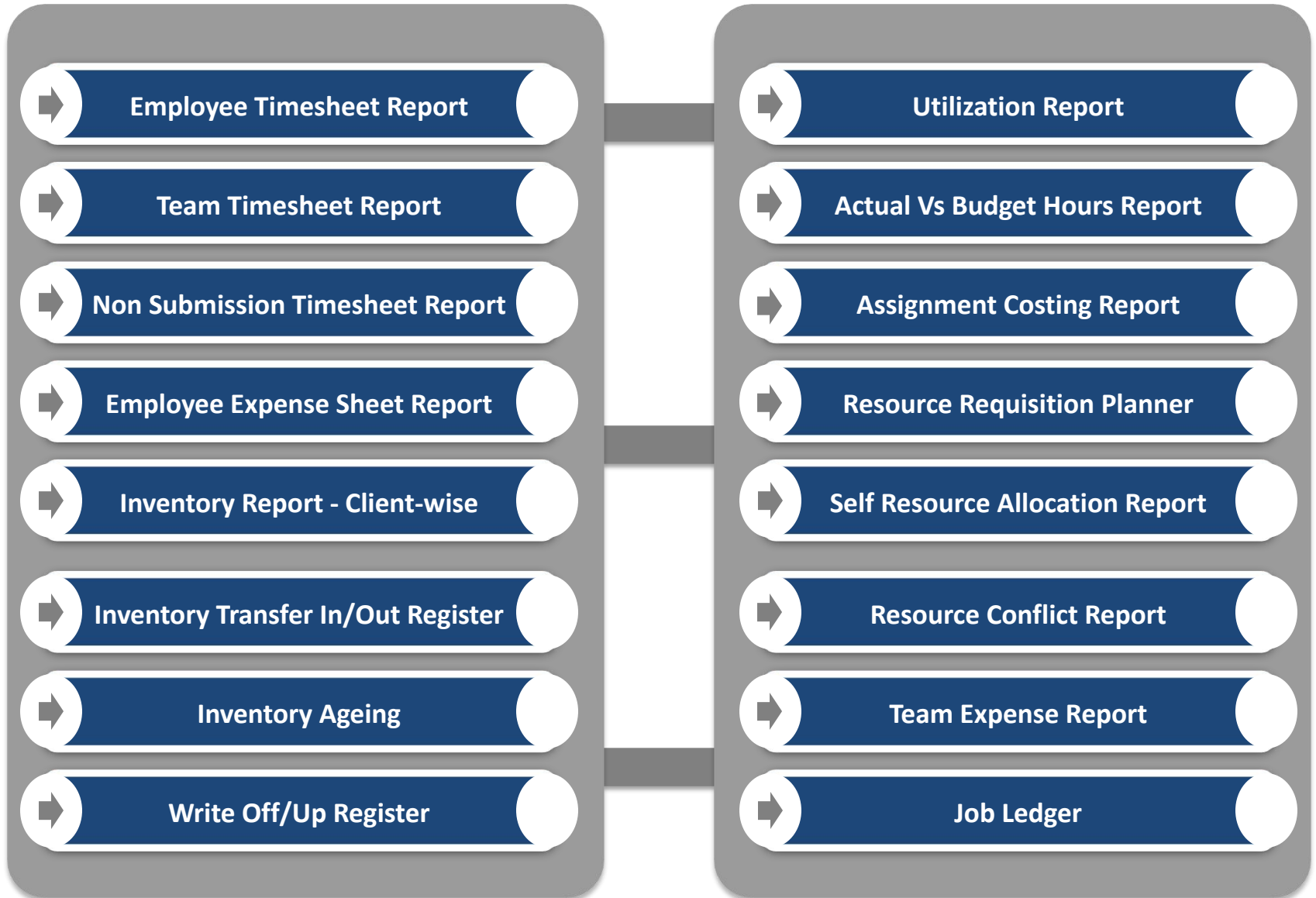
Elimination of Duplication

Quick Search

24/7 Access to Documents

Escalation & Delegations

MIS & REPORTS





Rajeev.Sharma@Osourceindia.com

Osource



Celebrating 10 Years of Service Excellence

Finance & Accounts Outsourcing | Human Resource Outsourcing
Information Technology Services

An ISO 9001-2008 & SSAE16 (SAS 70) Certified Company