

CORPORATE BROCHURE

Connect the work. See the business.

AI-powered professional services operations across talent, resources, delivery and financial visibility.



A practical working document

Use the examples and review tools to make the next decision clearer. Start with one engagement, one owner and evidence your teams can verify.

IN THIS EDITION

- 01** One connected operating model
- 02** Ten modules, shared business context
- 03** From implementation to adoption
- 04** A focused conversation about your needs

THE OPERATING MODEL

The context should stay with the work.

A services business does not run in isolated modules.

01 Commercial intent → workforce readiness

Translate expected work into dated requirements. Recruit, develop or redeploy against the capability the engagement needs.

02 Workforce readiness → delivery

Bring availability, skills and assignment commitments into project planning. Keep changes visible to the people accountable for delivery.

03 Delivery → financial visibility

Connect execution, approved effort and billing context. Review financial outcomes alongside the operating decisions that produced them.

04 Visibility → action

Use role-specific analytics and AI assistance to investigate exceptions and assign an owner to the next step.

START WITH YOUR OPERATING MODEL

Module scope, configuration and integrations are confirmed during scoping. No business outcome is guaranteed.

01 / APPLICANT TRACKING SYSTEM (ATS)

Hire for the work ahead.

Connect hiring decisions to business demand, then carry candidate context through the offer and joining process.

Start with an approved requirement

Define the role, skills, experience, budget and target joining date. Route requisitions through approvals and distinguish urgent delivery needs from tentative future demand.

Build a clearer candidate picture

Bring resumes, skills, experience, sources and application history into Candidate 360. Use AI-assisted matching and summaries to support recruiter review; hiring decisions remain with people.

Keep selection and joining connected

Coordinate interview rounds, panels and scorecards. Manage offer approvals, revisions and acceptance, then track documents, background checks and joining readiness before employee conversion.

02 / HUMAN RESOURCE MANAGEMENT (HRMS)

Support every stage of employment.

A shared employee record gives HR, managers and delivery teams the context they need without treating people as a collection of disconnected transactions.

One employee record, a complete lifecycle

Manage organization, employment, compensation, documents and skills alongside onboarding, probation, transfers, promotions and offboarding. Retain the history behind each change.

Make employee support accountable

Categorize HR, payroll, policy and document requests. Assign queues and owners, track service levels and escalations, and keep conversations and attachments with the request.

Connect assets, performance and readiness

Track device assignment, returns and exit clearance. Run goals, self-assessments, manager reviews and development plans. Maintain validated skills and certifications to inform future deployment.

03 / RESOURCE MANAGEMENT

Match commitments to real capacity.

Plan with dated demand, skills, availability and commercial constraints so that staffing decisions reflect the work the business can actually deliver.

See demand before it becomes urgent

Bring together opportunity-led, project and internal requests. Record skills, dates, allocation, probability and priority; distinguish tentative demand from confirmed commitments.

Allocate with the full picture

Compare people by skills, availability, experience, location, cost and billing rate. Manage tentative and confirmed bookings, partial allocations, extensions and releases across projects.

Act on bench and utilization

Review current and future bench, ageing, skills and cost. Compare forecast and actual utilization with agreed definitions, then pursue suitable redeployment opportunities.

04 / PROFESSIONAL SERVICES DELIVERY

Deliver the work. Understand the margin.

Manage delivery and understand the financial impact of every project, resource and hour.

Set the commercial and delivery baseline

Connect the customer, opportunity and contract reference to the project. Establish owners, billing model, rate cards, dates, budget, cost and target margin before execution.

Coordinate execution and governance

Plan epics, stories, tasks, sprints, milestones and releases. Maintain risks, issues, dependencies, actions and change requests with clear ownership and review dates.

Read delivery alongside financial outcomes

Review invoices, revenue, cost and margin in their project context. Investigate variance against the agreed baseline and trace it back to scope, staffing, effort or billing conditions.

05 / TIME, LEAVE & EXPENSE

Give every recorded hour its context.

Connect the work people report with approvals, availability and the evidence needed for downstream financial processes.

Record work against the right engagement

Capture project time with the context reviewers need. Keep submitted, approved and returned records distinct so unresolved items remain visible.

Plan around real availability

Bring leave and attendance context into capacity discussions. An allocation plan should reflect working patterns and planned absence, not headcount alone.

Keep approvals moving

Review time and expense exceptions with accountable owners. Approved records inform downstream checks; approval alone does not mean an item is ready to invoice.

06 / REVENUE FORECASTING & LEAKAGE

Explain the forecast. Locate the blockage.

Bring delivery and commercial context into revenue discussions so leaders can separate an expected outcome from a confirmed transaction.

Build a forecast that can be explained

Review demand confidence, staffing dates and delivery assumptions alongside revenue expectations. Keep committed work separate from uncertain pipeline.

Separate facts from exposure

Distinguish confirmed blocked value from estimated exposure. Identify whether the next action belongs to time approval, a commercial exception or invoice preparation.

Track recovery without confusing it with cash

Review resolved blockages alongside new exceptions and ageing. Moving a value into invoicing is a different event from collecting payment.

07 / INVOICING & BILLING

Turn completed work into a clear billing record.

Connect project evidence and commercial terms to the billing process, with visibility into what is ready and what still needs resolution.

Keep the engagement context close

Use the project billing model, contract reference and rate context when reviewing billable work. Make the basis of the invoice understandable to delivery and finance.

Resolve exceptions before they accumulate

Surface missing approvals and commercial gaps with owners. Review readiness across the relevant engagement rather than reconciling disconnected records at month end.

Follow the financial chain

Use invoice, revenue, cost and margin together when reviewing project performance. Agree the meaning and timing of each measure with finance.

08 / VENDOR MANAGEMENT

Bring external capacity into the plan.

Coordinate vendor participation with hiring and resource demand, while retaining visibility into source, responsibility and progress.

Share the requirement clearly

Give vendors the role, skills, dates and demand context they need. A well-defined requirement improves the relevance of submissions.

Keep submissions traceable

Track vendor candidates and their progression through the hiring process. Retain source information and avoid losing accountability as a candidate moves between stages.

Review contribution in business context

Compare vendor participation with the demand it serves. Use submission history and source effectiveness to support better sourcing discussions.

09 / ANALYTICS / ORG 360

Give leaders a connected operating view.

Bring capacity, talent, delivery and financial signals into one business conversation, with a clear distinction between observations and assumptions.

Start with the decision

A CEO, CFO, delivery leader and resource manager need different views of the same operation. Organize the discussion around the decisions each role owns.

Make metrics interpretable

Define period, population, denominator and source. Separate actuals from forecasts and confirmed leakage from estimated exposure.

Move from a signal to an owner

Use cross-functional context to investigate risk and agree the next action. Review what changed after the decision, not just whether a dashboard was opened.

10 / AI, AUTOMATION & INTEGRATION

Add intelligence where decisions happen.

Use AI assistance and connected workflows to reduce context gathering while keeping responsibility with the people who run the business.

Assist with specific tasks

Apply recruitment matching, summaries and natural-language search where they help reviewers work through information. Assess suggestions against the underlying record.

Connect workflows across handoffs

Carry relevant context between talent, resources, delivery and finance. Integration should preserve meaning and ownership, not merely copy fields.

Introduce automation with clear controls

Agree triggers, permissions, exceptions and human review points during implementation. Start with a bounded workflow and evaluate outcomes before expanding.

ADOPTION

Begin with a decision that matters.

A focused first workflow makes implementation easier to evaluate and the change easier to own.

1 / Map one real engagement

Follow a current opportunity or project through demand, staffing, delivery and billing. Identify where teams re-enter data or lose context.

2 / Agree definitions and ownership

Set consistent definitions for availability, utilization, forecast and margin. Identify who maintains each record and who acts on exceptions.

3 / Configure the connected workflow

Confirm modules, roles, approvals, data sources and integration scope. Validate permissions and exception paths with the people who will use them.

4 / Review the result

Compare the workflow with the baseline. Use evidence from real operating reviews to decide what to refine and where to expand.

Bring your next operating challenge.

Explore demand, people, delivery and financial visibility in a focused walkthrough.

Request a demo → connect@clousysbs.com