

# Stop the Pain: 7 Smart Project Management and Accounting Procedures that Work

How to Safeguard Your Cash Flow,  
Project Performance, and Profit Margins

by Michael Camp and Jered Cady © 2010

## Industry Focus

**Services:** Architecture, Engineering, Research, Software/IT, Professional Services

**Services & Materials:** MTO/ETO Manufacturing, Construction



# Thank you

Thanks goes to **Robin Smyth** of [Gillespie, Prudhon, & Associates](#), for allowing us to use his story to model the project- and financial-accounting solutions we recommend.

We want to thank **David Meerman Scott** whose book, *World Wide Rave*, provided the inspiration behind our ebook. You can learn more about David and the books he has written at [www.webinknow.com](http://www.webinknow.com).

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PS - If you really love *Stop the Pain: 7 Smart Project Management and Accounting Procedures that Work*, send it to as many people as possible.

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# Introduction

Robin was exasperated. He was about to acquire the principal position in the successful telecommunications engineering firm where he had worked for 12 years. But the problems loomed large.

He had limited and out-of-date information on project costs, revenues, and profitability. “I’m tired of our inefficiency and ineffectiveness in managing and billing projects,” he lamented. As a new CEO, he was desperate for change in the way his company performed project accounting. His vision was to take Gillespie, Prudhon, and Associates (GP&A) to the next level; to streamline project performance, increase tight margins, and create a market niche for GP&A as *the* go-to firm for telecommunication transmission systems.

Trouble was, despite his predecessor’s efforts, they were not making progress. GP&A’s procedures and technology tools for managing and accounting for projects were obstacles rather than assets. They couldn’t deliver on his goals. For the company’s sake and the sake of his financial, project-management, and IT staff, who struggled with the painful consequences, something had to give.

## Enduring Growing Pains

You may relate to Robin and his staff’s dilemma. Just like GP&A, your company may be at this phase when you are forced to endure a variety of growing pains. In the life of every project-based company, there comes a time when you must outgrow your start-up roots and become a more mature firm utilizing smarter technology to succeed.



Some companies never begin this maturation phase or never complete it. Their growth is stunted and their method for alleviating business pain is to remain small and accept their ineffectiveness as a handicap that comes with the territory. Sometimes these results are tolerable, but more often than not they result in poor client services and the inability to compete.

Robin considered this avenue completely unacceptable. GP&A's long-term mission and success depended on their passing the maturation phase with flying colors.

### What's in It for You

This ebook is written for companies like Robin's. If this describes your company, the book will identify your typical growing pains and prescribe a set of *7 Procedures* that can overcome your project-based maladies, and empower your company to transition to the next phase.

Upon reaching this new phase for your business, you have the potential to not only survive, but thrive: to excel in accounting and management functions like job costing, project bidding and budgeting, allocating resources, managing materials, keeping employees accountable, maintaining healthy cash flow, measuring and achieving profitability, meeting compliance requirements, and making confident business decisions.

*Stop the Pain: 7 Smart Project Management and Accounting Procedures that Work* builds on a previous ebook by Michael Camp entitled *7 Secrets the Healthiest Project-driven Organizations Know That You May Not*. We recommend you refer to that ebook first before reading this one. *7 Secrets* lays a foundation in the form of seven technology tools and practices a company needs to know before implementing the *7 Procedures*.

Once you understand the *7 Procedures*, you will want to consider the opportunities we offer at the end of the book to evaluate how to act on what you have learned. With that said, let's begin by examining early-phase, project-based organizations like GP&A and diagnose the conditions they generally face, before prescribing seven effective ways to treat them.

The book will identify your typical growing pains and prescribe a set of *7 Procedures* that can overcome your project-based maladies, and then empower your company to transition to the next phase.

Download the introductory ebook:

[7 Secrets the Healthiest Project-driven Organizations Know That You May Not](#)

# We Feel Your Pain

We really do. We and the team we work with have been there. Jered has been an IT Director of various organizations and an executive in technology companies for over 30 years.

He's seen companies' software and financial management problems from the inside and out.

Steve Toth, the CEO of our company, Synergy Business Solutions, has also been a CFO of two project-driven organizations that have survived the maturation stage. As a Systems Architect for the last 16 years, he has implemented more than 100 project, materials management, and financial systems.

Michael has listened to his share of stories from CEOs, CFOs, Controllers, and IT Directors. They divulged the problems they face trying to manage the complexities of a project-focused organization without the right tools. We've heard and seen it all.

- “We can't track the real costs of labor, materials, and equipment associated with each project,” a CEO complains. “Our project managers struggle to track resource assignments and maintain profitability.”
- “Our invoicing process is delayed up to 25 days because clients need extra accounting detail,” says a CFO. “This results in a 60- to 80-day accounts receivable turn that wreaks havoc with our cash flow.”



- “Our field-based managers have to request information by phone, and it’s driving me crazy,” a Controller confesses. “With no online access to data, people are dependent on me, and it’s crippling our operations.”

That’s just the tip of the iceberg. Does it sound familiar? The following is a list of common problems we hear from companies of all ages that remain in a technologically challenging phase. See if your company and your employees suffer from the following project- and financial-accounting maladies:

- Chronically poor project bidding, budgeting, and performance.
- Losing control of your costs.
- Exceedingly long billing cycles that negatively affect cash flow.
- A sluggish revenue stream.
- Inability to align people, projects, and resources.
- Team members who don’t collaborate due to the lack of access to integrated and well-managed data.
- Complexity and lack of timeliness of financial reports.

There are sound operational and financial practices you can adopt to solve these problems. In the next section, we will look at each issue in more depth and prescribe specific procedures to follow, with the help of flexible project- and financial-accounting software. First we need to review some necessary prerequisites.

“See if your company and your employees suffer from the following project- and financial-accounting maladies.”



## Prerequisites

The key to implementing procedures that cure the pain associated with the above issues is having a flexible, integrated system in place. In my (Michael) previous ebook, *7 Secrets the Healthiest Project-driven Organizations Know That You May Not*, I outlined how to maximize the use of your software tools and implement a flexible solution. If you don't already have such a system, consider this a short list of criteria for evaluating what you will need in a new one:

1. Your accounting software is designed for the way you do business, i.e., for project-focused organizations, thus minimizing customizations and the need to adapt to software.
2. Each software tool and stakeholder can draw on the same set of data, i.e., a central, secure database.
3. Your software tools are integrated with each other, i.e., data can flow from one application or function to another without the need for duplicate data entry.
4. Stakeholders can use the software most appropriate for their experience.
5. You can set up role-based visibility for all your stakeholders, i.e., assign staff rights to only access data appropriate to their job.
6. Your system is highly configurable to address your unique needs and has the ability to integrate with an array of pre-integrated third-party products when necessary.

Synergy works with software called Microsoft Dynamics SL that fits all six of these criteria. With a solution like Dynamics SL, you gain a flexible system that provides maximum segmentation of the project code and a work breakdown structure that can accommodate how you and your clients want to manage a project. With this flexibility, you can implement the following procedures:

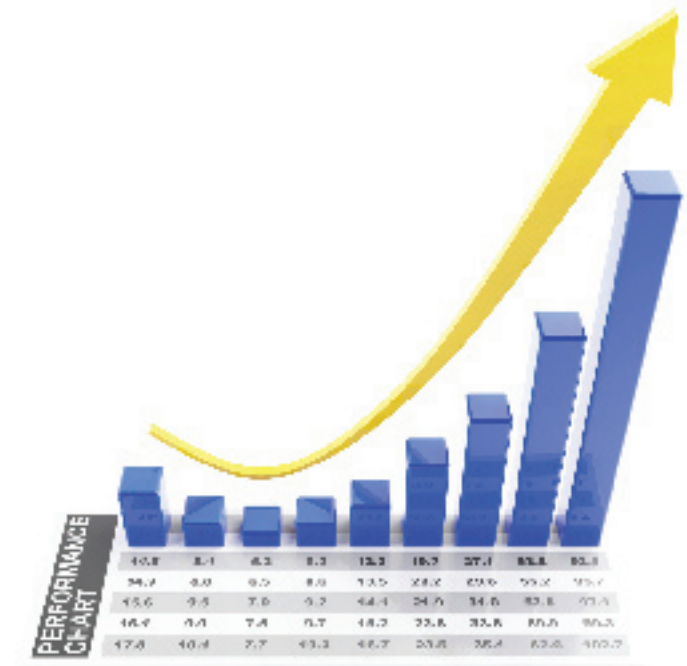


# 1 Strengthen Budgeting and Project Performance

How do you wind up with inaccurate budgets and poor project performance? Here are some causes:

- It's hard to structure your projects to match the way you do business.
- Creation of budgets is awkward without templates and tools to scale and modify data from previous budgets or the ability to import data.
- Project managers cannot effectively manage the budget process, nor easily track budget revisions or change orders.
- Measuring budget accuracy and comparing to actuals for measuring performance or for future bids is difficult or impossible.
- It's difficult to track and analyze project costs and performance midstream in order to predict your profit margins.
- Access to up-to-date real-time information on your project is impossible or limited; accountants and project managers use systems that don't talk to each other.

**THE PAIN:**  
Chronically poor project bidding, budgeting, and performance.



## Steps to Healthy Budgets and Project Performance

In this procedure, there are four steps you can take to stop the pain associated with budgeting and project performance.

### A Integrate Project Managers' Software with Accounting

The key to flexible budget development is getting your project managers' software "tool of choice" fully integrated with your financial system. Typically, their tool of choice is Microsoft Project or Microsoft Excel.

In Microsoft Project, here is how it works: When your project managers create a project plan, including defining the resources to use and the planned hours, the budget is calculated and automatically flows into the project-accounting system when the project is saved. It is stored as a *project budget version* of what he or she did in Microsoft Project.

The same capability is available when Microsoft Excel is integrated with your accounting. Project managers can create and modify budgets and make budget-to-actual comparisons without having to do duplicate data entry or navigate through "islands of data." With an automated way to do budget-to-actual comparisons, project managers can create more accurate future bids.

"This integration made it so easy for our project managers to track job costs," Robin said. "Suddenly, the painful, extensive manual work we did before is not necessary."

### B Develop Unlimited Budget Versions

You also need the ability to create and retain unlimited budget versions, generally associated with client or subcontractor change orders.

# 1 Strengthen Budgeting and Project Performance



## Steps to Healthy Budgets and Project Performance

With Microsoft Project or Excel integrated with your accounting, each time your project managers post a new or changed budget, a new *project budget version* is created for review and approval, with a full history maintained. This results in good data for accurate future budgeting.

### **C** Have Staff Enter Estimate-to-Complete Hours on Timecards

Another essential is having the ability for staff members to enter estimate-to-complete hours on their timecards in addition to hours worked. This provides better project-completion forecasting.

### **D** Have Access to Real-time Profitability Analysis

A fully-integrated solution will also enable real-time profitability analysis with all stakeholders looking at the same information at all times.

For example, your accounting system should include a module where you can analyze profitability with real-time availability of all revenue and costs that have been posted to the project. This will enable you to do much improved forecasting.

“Finally!” Robin exclaimed. “I can track performance in real time, know if we are making money on a project, and make the necessary adjustments. I’m no longer in the dark.”

# 1 Strengthen Budgeting and Project Performance



# Lose Your Surplus Costs

Why is it so difficult to control your costs? Here are the major reasons:

- You have no way to easily view, track, and approve labor and other expenses on projects before they're incurred.
- These expenses must be manually entered to update projects, AP, and the GL.
- Your accounting department must handle an inordinate number of business requests from employees and clients that eat up precious time.
- Rather than learn from past projects on costing, you frequently make the same mistakes.

## Steps to Controlling Costs

### A Set Up Web-based Capabilities for Your Project Managers in the Field

Project managers need to quickly and easily review and approve project expenses. They can do that with an accounting system that includes a web portal (In Dynamics SL it is SharePoint-based and is called Business Portal) where all expense reports can be reviewed and approved online. This ability to track and review expenses anywhere-anytime gives project managers a powerful tool to keep expenses in check and become more efficient.

**THE PAIN:**  
Your costs are getting out of control.



## **B** Enable Ability for Approved Expenses to Post Directly to AP

Rather than enter expenses manually into Accounts Payable and the General Ledger, approved expenses need to post directly to your accounting system for payment to vendors and employees. For example, a good Time & Expense Module automatically creates a voucher in AP for each person who needs to be reimbursed. This saves a lot of time and trouble.

## **C** Use Your Web Portal and Easy Access to Data to Cut Costs

When you allow staff, vendors, and clients controlled access to your web portal (Procedure 2A) coupled with timely access to data, it frees up other accounting staff. They either won't have to handle those time-consuming business requests that come in, or they are able to answer them without pulling their hair out.

Moreover, you should utilize security validation to control access so people only see or enter data appropriate to them. Staff members view their accounts and employee records and expense reports online. If you decide to allow vendors and clients to have access, they see only what they need to see in their own account, and when they need more, it's easy for your staff to produce.

“Our clients require four levels of accounting detail,” Robin says. “It now takes minutes, rather than hours, to give clients the enhanced information they request.”

## **D** Use the Tools at Your Disposal to Manage and Budget for Projects

When your project managers use these new integrated tools – Microsoft Project and Excel integrated with accounting (Procedure 1A) and a web portal (Procedure 2A and 2C) – they have functionality to easily analyze budget-to-actual expenses, learn from previous projects, and make better decisions on future projects that will ultimately help you control costs.

## **2** Lose Your Surplus Costs



# Cure Your Cash Flow

There are several reasons your company may have long billing cycles that negatively affect cash flow. The most common are:

- You rely on manually creating invoices, in Excel or Word, with tedious entries for time, expense, materials, and overhead charges.
- Projects and clients have different billing methods, rate structures, mark-up rules, and invoice formats, sometimes with projects even split among multiple companies.
- After approval, you must manually post invoice amounts to Accounts Receivable and the General Ledger.
- Your Accounts Receivable “days outstanding” can easily be 90 days or more.

## Steps to a Healthy Cash Flow

By implementing the following steps through an integrated project- and financial-accounting system, you can gain the functionality and flexibility necessary to overcome all the issues listed above.

### A Use Your Web Portal to Speed Up Tasks

Once you have a web portal, you will have web-based entry capabilities for employee time-cards, reimbursable expenses, subcontracts, and materials used on a project. This enables rapid turnaround for transactions and approvals, providing increased efficiency.

**THE PAIN:**  
Exceedingly long  
billing cycles that  
negatively affect  
cash flow.



## **B** Store a Variety of Billing Methods

Take advantage of a flexible system and utilize a powerful method for storing the multitude of rates, markups, and calculation methods you need, as well as different billing methods (Fixed Fee, Time and Material, Cost Plus, etc.) and multiple invoice formats for each project.

Implement an accounting system with a module that allows for virtually unlimited storage of multi-level rates and markups common across all projects or unique to a specific project in a specific time span (in Dynamics SL, it's called Project Allocator). These include compound rate calculations and all necessary calculations for government contracts. You will also want the capability for unlimited invoice formats including two for each project, such as summary and detail.

“With our clients receiving invoices three weeks earlier than previously, the time to payment has significantly shortened,” says Robin. “This has a considerably positive impact on our cash flow.”

## **C** Implement Automated Invoice Generation and Alerts

With a flexible billing module, you can automate invoicing and send alerts to your project managers for online review, modification, and approval. It can be run as one process that creates draft invoices for a group of projects you select and automatically sends the alert to the respective project manager. Then the invoices can be delivered by fax, email, or mail, depending on the client's requested method, and automatically posted to AR and the GL.

This automation eases the pain by speeding up the invoicing process.

# 3 Cure Your Cash Flow



## D Follow Sound Billing, Collection, and Reporting Practices

Once your accounting department and project managers are following the above steps, you have enabled them to be *disciplined* to implement best practices for billing, collection, and reporting. Here are some practices for you to consider implementing and/or improving:

- Change from a monthly billing schedule to a weekly one.
- Specify payments due within 15 or 30 days with interest charged for late payments.
- Require project managers and reviewers to complete their reviews within one day.
- Send invoices within one day maximum after they are generated.
- Stick to a smart collection policy.
- Generate weekly Accounts Payable and cash-flow forecasting reports.

## 3 Cure Your Cash Flow



# 4 Maximize Your Revenue Stream

Your sluggish revenue stream is probably caused by the following:

- You lose billable hours when change orders are delayed or due to miscommunication, resulting in unauthorized work.
- You can't easily track hours and revenue and compare them to your billable-time goals for projects and employees.
- It's hard to hold employees accountable to billing and productivity goals.

## Steps to Increase Revenue Flow

When your staff's time is your most significant revenue source, it is vital to have highly efficient and effective processes to deliver services that satisfy your clients' expectations, so they will pay the resultant invoice on time. These steps will help this process:

### **A** Strengthen Management of Client and Subcontractor Change Orders

You need the ability to manage client and subcontractor change orders and their associated budget changes without delaying the work. An optimal project-based accounting system will have a fully integrated Contract Management module that enables you to create, analyze, approve, and track change orders by line item or the original budget. This helps prevent charges on unapproved change orders and ensure that payments to subcontractors follow performance milestones.

**THE PAIN:**  
You lose billable hours,  
productivity is not  
optimum, and you can't  
determine whether  
you have met  
utilization goals.



## Steps to Increase Revenue Flow

# 4 Maximize Your Revenue Stream

## **B** Utilize a Project Analyzer Tool to Track Profitability

A tool that allows your project managers to analyze billable time on projects in real time and compare it to the goals set for the project and employees is invaluable. A Project Analyzer module gives you access to up-to-date project revenue and expenses with the ability to drill down to every detailed transaction. The tool enables you to accurately track and analyze project profitability and make adjustments when necessary.

As Robin discovered, when you have the tools to get projects to perform better, revenue increases.

## **C** Manage Billable Hours and Revenue by Employee

Regardless of how many billable projects you work on, you should track hours by employee by month, the availability of your personnel, time already billed to projects, revenues from that time, and how you have or have not met utilization goals. With an Employee Utilization module, as timecards are completed and approved, the hours and revenue for billable projects are posted for goal-to-actual analysis. This can allow you to develop an improved employee incentive system, motivate employees, and increase productivity.



# Align People, Projects, and Resources

The following are signs that your company is not aligning your people, projects, and resources.

- Your company rarely finishes a project on time.
- Resource planning suffers. It's difficult to ascertain resource availability
- Your method of project scheduling doesn't ensure that each person or resource knows what is to be accomplished and in what time frame.

## Steps to Proper Alignment

To adjust your alignment, follow these steps:

### **A** Assign Your Resources to Specific Tasks and Time Frames

When you have the ability to assign any type of resource, be it staff, facilities, or equipment, to a specific task within a time frame, you know who's working on which project, and more importantly, you now know who is not working on a project and who is available for assignment.

With an integrated project-based accounting system, you can use Microsoft Project or a Resource Assignment module to assign any resource to a project or task and easily track it and identify resources that are available.



## THE PAIN:

Your inability to get the right people on the right projects with the right resources prevents you from finishing your projects on time.

## Steps to Proper Alignment

# 5 Align People, Projects, and Resources

## **B** Automate Communication about Resource Assignment

Once a resource is assigned, you need a way to efficiently communicate this to the person responsible. In conjunction with a flexible project-accounting system, you can use Microsoft Project or Microsoft SharePoint to set up alerts on an employee's home page or by email. There's also a module called Communicator that will do this in Microsoft Dynamics SL.

## **C** Set Up Anywhere-Anytime Access to Project Data for Field Personnel

In Procedures 2A and 3A, you already learned about setting up a Web Portal to help employees in the field access and enter data. With or without a VPN, the portal can also be used to get email alerts and resource assignments, and access timecards, expense reports, and other aspects of your project management system.

“Business Portal not only helps us become more efficient with daily tasks, but has enabled us to become a telecommuting company,” says Robin. “This new freedom improves employee morale.”



# 6 Enable Collaboration and Document Management

Without efficient collaboration and easy sharing of business data, productivity suffers. This collaboration disorder results in the following:

- Your employees can't enter time and expenses or do database queries themselves; they are dependent on someone else to do it.
- There is no structure to manage documents and share them with other stakeholders in a controlled environment.
- Your project teams have no way to efficiently access and manage project tasks, approvals, status reports, and issues.
- Off-site personnel cannot access data and documents.

## Steps to Cure the Disorganization

### A Develop a Browser-based Information System

We've already explained the advantages of a web portal (Business Portal in Dynamics SL) to speed up tasks and do time-and-expense entry and review. The portal is also vital to enable company-wide collaboration.

**THE PAIN:**  
Team members don't collaborate due to the lack of access to integrated and well-managed data.



# 6

## Enable Collaboration and Document Management

### Steps to Cure the Disorganization

In addition to opening on-site or off-site access to email alerts, resource assignments, time-cards, expense reports, analysis, project tasks, approvals, and status reports, a SharePoint-based portal provides a way of organizing documents in a secure repository. Stakeholders store and preview documents and data based on their access rights. Project managers, team members, and other work groups can initiate self-service collaborative workspaces and tasks within the parameters you set.

### **B** Store and Update Company Documents in a Secure Database

It is also important in this day and age to store all project and company documents in a secure database with the appropriate access rights for searching, updating, sharing, and version control. For instance, Microsoft SharePoint, the foundation for Business Portal, stores all documents and data in a secure Microsoft SQL Server database.

### **C** Ensure the Integrity of the Content of Your Documents

Once you've done steps A and B, a good document management system has the capability to put other controls in place. You should have the ability to activate required document checkout before editing, view revisions to documents and restore to previous versions, and set security on either the document or item-level. Microsoft SharePoint provides all these capabilities.



# Practice Smart Reporting

Why can't you create timely, meaningful reports and stay on top of your business trends? Here are some reasons:

- Someone bears the burden of answering information requests for simple business facts and/or creating custom reports.
- People can't easily create their own reports using the tool of their choice.
- Your reporting is not in sync with your accounting system.
- You lack the ability to generate the reports you really need with real-time data to make critical business decisions.

## Smart Reporting Tools

Once you have confidence in the data entered, reviewed, approved, and stored in a new system, it follows that you need the best flexible reporting tools to turn any type of data into information that supports good decisions to accomplish the goals of your projects and your company. There are several types of reporting tools available.

### A Connect Microsoft Excel to Your Live Data

With a flexible project-accounting system, your staff can use the tool of their choice (which is often Excel) to get the reporting they need. You can connect Excel to 100 percent of your accounting data and quickly create pivot tables to provide rapid and insightful analysis.

**THE PAIN:**  
Complexity and lack  
of timeliness of  
financial reports.



## Smart Reporting Tools

### B Non-Financial Reporting Tools

The most commonly used tool for non-financial reports (lists of projects, vendors, or clients) is Crystal Reports, although many companies are also beginning to use Microsoft SQL Server Reporting Services (SRS).

For example, Dynamics SL includes almost 500 reports created with Crystal Reports, and all report source code and a version of Crystal Reports are included with the applications. All new reports are now being developed with SRS, and the code is also included. SRS is included with Microsoft SQL Server.

### C Customizable Financial Reporting Tool

Finally, you will need a tool that interfaces with your accounting system to provide you comprehensive, meaningful, and highly adaptable financial and management reports that are easy to create, distribute, and use. With Dynamics SL, the included tool is called FRx.

With this tool, you gain the ability to create an unlimited set of easy-to-build financial reports that are customizable, link to Microsoft Excel, drill down to GL or an original document, and are publishable on the web.

## 7 Practice Smart Reporting



**Microsoft Dynamics SL gives us more data, better data, and more timely data. Our managers are able to make better, faster decisions each day, as well as more intelligent long-range planning decisions.**

Brian Allen  
Chief Executive Officer  
ATS Automation

# A Thriving Business

In our opening story, Robin, CEO of an engineering firm, was frustrated that he couldn't control project accounting and performance and therefore maximize things like employee productivity, customer satisfaction, and profit margins.

To ease the pain his staff members felt, and compete in the marketplace, his company needed flexible project- and financial-accounting software.

His story has a happy ending. GP&A made sure they had the system prerequisites in place, then implemented the *7 Procedures* discussed above, and a majority of the specific steps. They did not implement all seven at once, but worked their way from most significant to least significant for their business, until the procedures were completed.

They stopped the pain and set in motion preventative measures to ensure they could effectively handle future growth.

Can you relate to Robin's story? If it's clear that you must take similar steps to enable your company to successfully reach the maturation level, know that change starts by accepting a new mindset and then having the will to embark on a new course of action.

On behalf of your company, ask yourself this question: Can we afford not to act?



# Take the Next Step

When you are ready to act on what you have learned, the next step is to consider some of the resources and opportunities available on our company's web site at [www.synergybusiness.com](http://www.synergybusiness.com).

## Download and obtain more valuable information:

- Access [Project Accounting Resources](#) to find videos and documents, including case studies, testimonials, demos, fact sheets, and more, about available tools and how others implemented the *7 Procedures*.
- Visit our [Integration Facts](#) page and learn how software, such as Microsoft Excel, Microsoft Project, SharePoint, Business Portal, and Dynamics SL, talks to each other and provides a foundation for implementing the *7 Procedures*.

# Share the Remedy

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# About the Authors



**Michael Camp** has been a writer and marketing professional for 14 years. He has written articles for trade publications and *Accounting Technology* and is also a blogger on [Project Accounting Best Practices](#). As Director of Marketing at [Synergy Business Solutions](#) since 2006, Michael frequently talks to CFOs, Controllers, IT Directors, and Project Managers of project-driven companies on the problems they face in financial and project management.

Prior to his experience in technology companies, Michael served as a development specialist for aid agencies in Africa and the U.S. for 12 years and was a senior writer for World Vision. His favorite charity is [Opportunity International](#), which provides micro loans to the poor all over the world.



**Jered Cady** has worked in the computer and software business for over 35 years. He has a deep understanding of business processes in the project accounting, financial, and materials management markets, and broad experience in financial reporting and analytics. A former employee of Timeline and Solomon Software, he has worked in the financial reporting and budgeting market for 15 years and in the Microsoft Dynamics market for 13 years. As Executive Vice President of [Synergy Business Solutions](#), he uses his technology background and sales/marketing experience to propose workable and tested solutions to project-driven organizations.

Prior to Synergy Business Solutions, Jered served as CIO of an information services company, Director of IT at a Seattle-based university, and IT Director at a large non profit.

## About Their Company

[Synergy Business Solutions](#) empowers companies that obtain their revenue primarily through project-based work. Through a team of certified implementers, CPAs, CMAs, and Microsoft Certified Professionals, they provide project-management and financial-accounting software and services that include a needs analysis, project planning, prototyping, software installation, configuration, customization, integration, data conversion, reporting, training, and ongoing support.