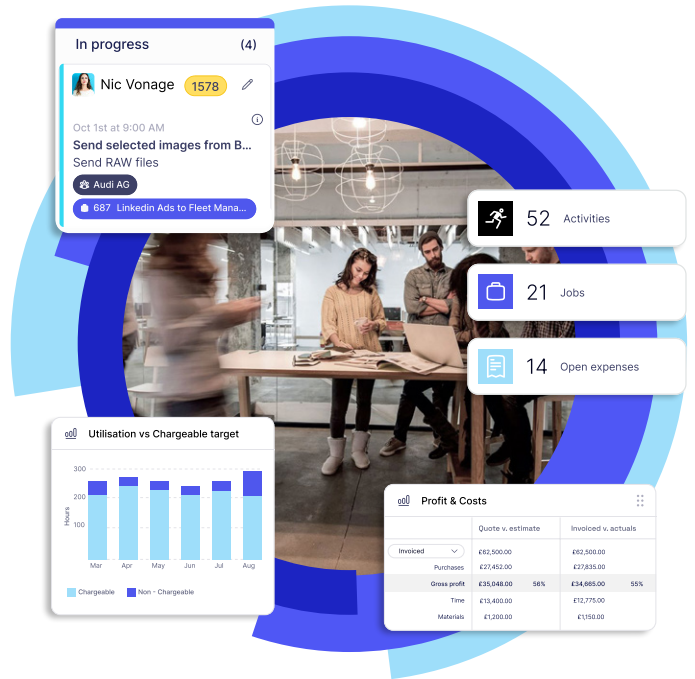




Powerful agency management software

Synergist is the go-to software for agencies looking to streamline operations, improve profitability and grow intelligently.



Trusted by the UK's top-performing agencies and consultancies

15k+
Users

4.2M+
Projects

36%
Growth

Everything you need to manage and grow your agency

From new business to billing and everything in between, all in one highly customisable platform designed to adapt and scale with you.



Opportunities

- ✓ CRM
- ✓ Unlimited contact data
- ✓ Leads, prospects & clients
- ✓ Comms & docs
- ✓ Tasks & reminders
- ✓ Branded quotes
- ✓ Opportunity weighting
- ✓ Revenue & profit forecasting
- ✓ Target tracking



Clients

- ✓ Client & contact management
- ✓ Client rate cards, markups & discounts
- ✓ Target tracking
- ✓ Investment tracking
- ✓ Performance dashboards
- ✓ Retainer management
- ✓ Managed sales orders
- ✓ Microsoft & Google integration



Projects

- ✓ Job templates
- ✓ Projects, jobs, phases & stages
- ✓ Estimating & quoting with options
- ✓ Purchasing
- ✓ Project planning
- ✓ Task management
- ✓ Comms & docs
- ✓ Budget tracking & profit reporting



Resources

- ✓ Capacity forecasting vs bookings
- ✓ Resource scheduling
- ✓ Workload tracking
- ✓ Personal schedules & task lists
- ✓ Online collaboration
- ✓ Timesheets
- ✓ Expenses
- ✓ Utilisation targets



Financials

- ✓ Revenue, GP & NP reporting
- ✓ Purchase management
- ✓ Multi-currency
- ✓ Multi-company
- ✓ Billing
- ✓ Revenue recognition (deferred payments)
- ✓ Month-end reporting
- ✓ Accounts integration



Intelligence

- ✓ Forecasting
- ✓ Sales
- ✓ Profitability
- ✓ Client analysis
- ✓ Capacity
- ✓ Utilisation
- ✓ Advanced analytics
- ✓ Integrations & APIs

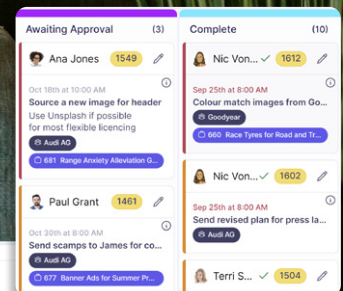
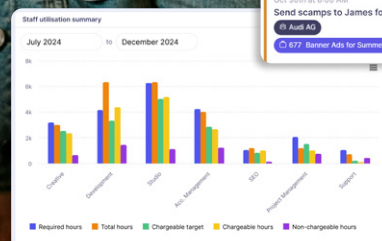
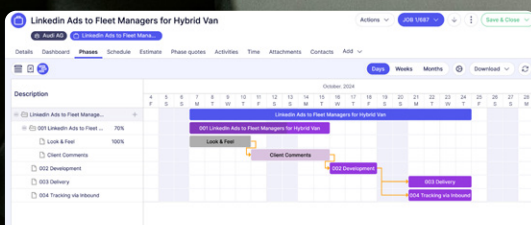
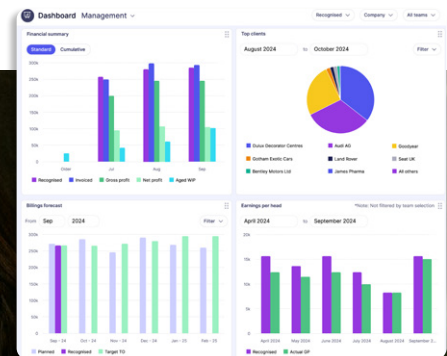
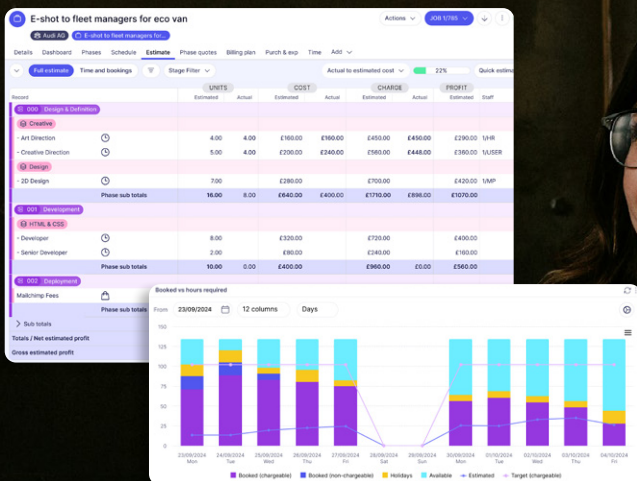


Why do agencies need Synergist?

Agencies operate in a fast-paced environment where managing project efficiency, client profitability, and capacity management is critical. Many agencies struggle with disconnected tools for quoting, task management, resourcing, time tracking, and reporting. Synergist solves these challenges by bringing everything together in one powerful system.

Synergist helps agencies...

- ✓ **Accurately forecast:** know exactly what's coming in, where you have capacity, where you need resource, and monitor progress against targets.
- ✓ **Drive profitability:** build realistic quotes, track time and costs in real time to prevent overservicing, and understand which clients, projects, and services are profitable.
- ✓ **Optimise utilisation:** see where people are spending their billable and non-billable time, and streamline your workflows and communication to enhance productivity.
- ✓ **Strategic insights:** get the specific data and create the exact reports you need to identify trends and make informed decisions about your new business, client, service and people strategies.
- ✓ **Streamline financial management:** boost efficiency and control over invoicing, purchasing, expenses, and revenue recognition with streamlined workflows and seamless integration with your accounting software.



Unlock agency-wide efficiency and profitable growth

Agency leaders	<p>Synergist gives you complete visibility into what's happened, what's happening, and what's going to happen in your agency so you can make informed decisions.</p> <ul style="list-style-type: none">✓ Live forecasts and KPI dashboards✓ Granular client and project profit reporting✓ Automated management reports and alerts
Client and Project managers	<p>Synergist gives you all the tools you need to plan, manage, and track your prospects, clients, projects, and retainers effectively and profitably.</p> <ul style="list-style-type: none">✓ Job templates, checklists, workflows, reminders and alerts✓ Real-time project progress and budget tracking✓ Client targets and profit reporting
Resource managers	<p>Synergist helps you accurately forecast capacity, optimise resource allocation and ensure utilisation targets are met.</p> <ul style="list-style-type: none">✓ Real-time capacity forecasts and workload reporting✓ Smart scheduling workflows based on budgets and priority✓ Detailed timesheet and utilisation reporting
Finance managers	<p>With Synergist, there's no more chasing. Instantly see what's happening with projects and stay in control of costs.</p> <ul style="list-style-type: none">✓ Accurate forecasts and financial reporting✓ Purchase approvals, billing plans and revenue recognition✓ Seamless accounting software integration
Teams	<p>Everything your team needs in one place.</p> <ul style="list-style-type: none">✓ See schedules and tasks✓ Access job info, documents and communications✓ Easily record time and expenses - via desktop or app

Efficiency

Save 1 hour a week x 25 people x £90/h ≈ £100k per year

Profitability

Reduce overservicing by just 2 hours x 200 projects x £90/h = £36k per year

Utilisation

Increase billable-hours from 60% to 70% x 15 people x £90ph ≈ £235k per year

Growth

Businesses using data to make decisions and optimise processes are x19 more likely to be profitable (*McKinsey*)

Why is Synergist the best choice for agencies?

Synergist offers hundreds of customisable features that can be tailored to your agency's specific requirements. Whether you're 10 or 500 people, design or digital, Synergist can scale and shape to work the way you need.

Our team of highly experienced agency experts are by your side to help set up Synergist and provide ongoing support to elevate your agency's performance.

“

Synergist is the best investment we have made as an agency, and I would absolutely recommend it to any marketing services business that wants to understand exactly what is making them money, and where all the time is being spent.

”



David van Schaick
CMO, The Marketing Practice

Onboarding Synergist

Our implementation experts will help design, configure, integrate, train, and launch Synergist without a hitch. They've helped hundreds of agencies optimise their processes and reporting. Some have spent years working in senior roles in agencies, while others have spent years helping agencies improve performance. So they know how to make an agency really work.

Typically, the whole process takes around 8-12 weeks, depending on complexity. Once your requirements are understood, they'll create an onboarding plan with timings and costs.

Subscription pricing

Your monthly subscription is made up of a core hosting fee plus the number of full and timesheet users you need. As the number of users increases, the cost per user decreases.

- Full users have access to all features: £33-£54 user/month
- Timesheet users can enter time and expenses and view job info: £13-£21 user/month



See Synergist in action

Our agency experts will show you how Synergist can be shaped for your agency's unique needs and answer any questions you may have.

Visit www.synergist.co.uk to book a demo.

