ConsultPro

The Complete Business Platform for HR Consulting Firms

Prepared for: TeamACE Nigeria **Prepared by:** Rozitech (Pty) Ltd **Date:** December 2025

Transform Your HR Consulting Operations

ConsultPro is a purpose-built business platform designed exclusively for HR consulting and outsourcing firms. Unlike generic CRM or HR software, ConsultPro understands your unique business model - managing client relationships, deploying staff, tracking engagements, and ensuring you get paid on time.
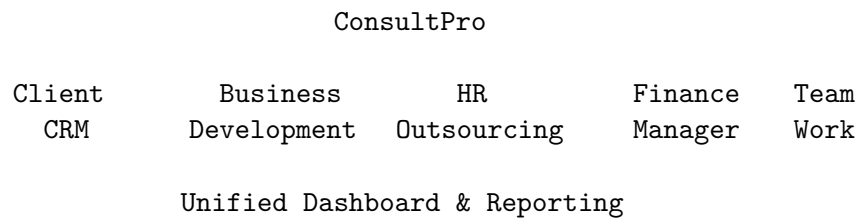

The Challenge

HR consulting firms face unique operational challenges that generic software cannot address:

Challenge	Impact
Scattered Client Data	Client information spread across spreadsheets, emails, and paper files
Lost Opportunities	No systematic way to track leads and sales pipeline
Staff Deployment Chaos	Difficulty tracking which staff are deployed where
Invoicing Delays	Manual invoice creation leads to delayed payments
No Visibility	Leadership lacks real-time insight into business performance

The result? Lost revenue, inefficient operations, and frustrated teams.

The Solution: ConsultPro

ConsultPro brings everything together in one powerful, easy-to-use platform:

```
                    ConsultPro

   Client       Business       HR        Finance   Team
    CRM       Development  Outsourcing    Manager   Work

          Unified Dashboard & Reporting
```

1

Platform Modules

1. Client Relationship Management

Know your clients inside and out.

Build lasting client relationships with a complete 360-degree view of every client.

Feature	Benefit
Complete Client Profiles	All client information in one place - company details, contracts, history
Contact Management	Track every key contact with roles, preferences, and communication history
Engagement Tracking	Monitor all projects and services per client
Document Library	Store and organize contracts, proposals, and reports
Activity Timeline	Never miss a follow-up with complete interaction history
Client Portal	Optional self-service access for your clients

Key Capabilities: - Quick client search and filtering - Custom fields for your specific needs - Bulk import from existing spreadsheets - Client health scoring - Automatic relationship reminders

---

2. Business Development

Win more deals with a structured sales process.

Transform your sales efforts from ad-hoc to systematic with visual pipeline management.

Feature	Benefit
Lead Capture	Capture leads from any source - referrals, website, events, LinkedIn
Visual Pipeline	Kanban board view shows exactly where every deal stands
Opportunity Tracking	Track deal value, probability, and expected close dates
Proposal Management	Create, send, and track proposals
Revenue Forecasting	Predict future revenue with pipeline analytics
Team Performance	Track BD team activity and results

Key Capabilities: - Customizable pipeline stages - Lead scoring and prioritization - Email integration for outreach - Win/loss analysis - Sales activity tracking - Automated follow-up reminders

---

3. HR Outsourcing Management

Deploy staff efficiently and track every assignment.

Purpose-built for firms that place staff at client sites - the feature no other platform offers.

Feature	Benefit
Staff-Client Assignments	Track who is deployed where, when, and at what rate
Deployment Calendar	Visual overview of all active placements
Contract Management	Manage service agreements and terms
Service Logging	Record services delivered for accurate billing
Staff Profiles	Maintain skills, certifications, and availability
Capacity Planning	See available staff for new placements

Key Capabilities: - Assignment start/end date tracking - Rate and billing configuration per assignment - Staff utilization reporting - Client site information - Renewal reminders - Historical placement records

---

4. Finance Manager

Get paid faster with streamlined invoicing.

From engagement to invoice to payment - close the revenue loop efficiently.

Feature	Benefit
Professional Invoices	Generate branded invoices in seconds
Automated Calculations	Pull data from engagements for accurate billing
Payment Tracking	Know exactly what's paid, pending, and overdue
Receivables Aging	Identify collection priorities at a glance
Payment Reminders	Automated notifications for overdue invoices
Financial Reports	Revenue, receivables, and cash flow visibility

Key Capabilities: - Nigeria tax compliance (VAT, WHT) - Multiple currency support - Recurring invoice scheduling - Partial payment handling - Credit note management - Bank payment integration ready

---

5. Team Collaboration

Keep everyone aligned and productive.

Built-in tools to ensure nothing falls through the cracks.

Feature	Benefit
Task Management	Assign and track tasks across the team
Notes & Comments	Collaborate on any record with threaded discussions
Approval Workflows	Route proposals, invoices, and expenses for approval
Notifications	Real-time alerts for important events
Activity Feeds	See what's happening across the organization
Calendar Integration	Sync with Google Calendar or Outlook

Executive Dashboard

See everything that matters at a glance.

ConsultPro's executive dashboard gives leadership instant visibility into business performance:

Widget	Insight
Revenue Overview	Monthly/quarterly/annual revenue trends
Pipeline Value	Total opportunity value by stage
Active Engagements	Current projects and their status
Staff Utilization	Deployment rates and capacity
Receivables Summary	Outstanding payments and aging
Team Activity	Recent actions and upcoming tasks
Client Health	Engagement levels and at-risk accounts
BD Performance	Leads, conversions, and win rates

Why ConsultPro?

Built for HR Consulting

Unlike generic CRM or HR software, ConsultPro is designed specifically for firms that: - Manage client relationships (not just employees) - Deploy staff to client sites - Bill clients for outsourced services - Need to track proposals and win deals

Africa-Ready

- Nigeria tax compliance built-in
- Naira (NGN) as primary currency
- Local payment integration ready
- Works on African internet infrastructure

Easy to Use

- Clean, modern interface

- Works on any device (desktop, tablet, mobile)
- Minimal training required
- Import your existing data easily

Secure & Reliable

- Enterprise-grade security
- Daily automatic backups
- 99.9% uptime guarantee
- Your data belongs to you

What Sets ConsultPro Apart

Generic CRM	HR Software	ConsultPro
Client contacts only	Employee management	Clients + Staff + Deployments
Basic pipeline	No sales features	Full BD pipeline
No HR features	Internal HR only	Client-facing HR outsourcing
Separate invoicing	Payroll focused	Client invoicing & receivables
Not Africa-focused	Limited localization	Nigeria-compliant, Africa-ready

---

Implementation Journey

Phase 1: Foundation (Weeks 1-12)

- Platform deployment and configuration
- Data migration from existing systems
- User training and onboarding
- Core modules live: CRM, BD, Finance, HR Outsourcing

Phase 2: Optimization (Weeks 13-24)

- Custom field configuration
- Workflow automation setup
- Report customization
- Integration with external systems

Phase 3: Growth (Ongoing)

- Advanced analytics and insights
- Additional user onboarding
- Feature enhancements based on feedback
- Continuous improvement

Success Metrics

Organizations using ConsultPro typically experience:

Metric	Improvement
Time to Invoice	70% faster
Collection Cycle	15-20 days shorter
Lead Conversion	25% higher
Staff Utilization Visibility	From 0% to 100%
Admin Time	10+ hours/week saved
Data Accuracy	Significantly improved

Getting Started

Step 1: Discovery

We learn about your current operations, pain points, and goals.

Step 2: Configuration

We set up ConsultPro to match your business processes.

Step 3: Data Migration

We help you import existing client, staff, and financial data.

Step 4: Training

We train your team to use the platform effectively.

Step 5: Go Live

Launch with our support to ensure a smooth transition.

Step 6: Ongoing Support

Continuous assistance to maximize your investment.

About Rozitech

Rozitech is a South African technology company specializing in business software for African enterprises. With a portfolio of proven platforms serving clients across the continent, we understand the unique challenges and opportunities of operating in Africa.

Our Commitment: - African-built, Africa-focused solutions - Enterprise-grade technology - Responsive support - Long-term partnership approach

---

Next Steps

1. **Schedule a Demo** - See ConsultPro in action
2. **Discovery Workshop** - We learn about your specific needs
3. **Proposal Review** - Receive a tailored implementation plan
4. **Partnership Agreement** - Begin the transformation journey

---

Contact

Rozitech (Pty) Ltd

Ready to transform your HR consulting operations?

Let's discuss how ConsultPro can help TeamACE grow.

ConsultPro - Purpose-Built for HR Consulting Success

Document Classification: Marketing Proposal **Version:** 1.0 **Date:** December 2025

This document is prepared for TeamACE Nigeria and contains proprietary information about ConsultPro platform capabilities.