

Proteus Project Sales and Delivery Software



Proteus
Work. Simplified.

xergy.com/proteus

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Proteus is a cloud-based, feature-rich end-to-end project sales and delivery solution. Developed by Xergy Group for the engineering and energy consulting industries, Proteus is a simple, easy-to-use software enabling decisive, data-driven decision-making across all levels of a business. Proteus has two powerful modules; the **sales module** and the **delivery module** that cover all key workflows from enquiry to cash. Fit-for-purpose features enable businesses to meet project demands, from determining whether to bid on project opportunities, to writing proposals, to monitoring project progress and managing variations, resources, time and people, Proteus provides organisations with a central source of operational data.

Transitioning companies away from data silos, disconnected systems and complex spreadsheets, Proteus eradicates errors and inaccuracies whilst helping users win more business, improve decision-making and increase their profitability.

Customised solutions and integrations with third-party systems such as Oracle, Microsoft and Workday, ensure Proteus' users have the exact solution required for their business.

Proteus keeps work simplified.



- ✓ Integrates with existing systems
- ✓ Cloud-based, SaaS pricing
- ✓ Single Sign On
- ✓ Designed by energy experts
- ✓ Intuitively designed interface
- ✓ Connect key workflows
- ✓ Manages full project lifecycle
- ✓ Eliminates wasted time & errors
- ✓ Delivers best practice processes

Is Proteus for you?

If your engineering consultancy uses spreadsheets or large ERPs such as Oracle Primavera, and your project team struggle to access the data they need, Proteus complements & enhances these tools, and will make a measurable impact on project outcomes, improving timelines & margins.

Get everyone onto the same page with Proteus.



Built for engineering consultants by engineering consultants

Sales Module

Integrating with your existing CRM, the sales module helps you unlock your full sales potential and boosts your win rate. Proteus' advanced **opportunity** and **proposal** features streamline project bidding and proposal writing.

Key functionality

- Opportunity evaluation
- Work breakdown structure
- Resource planning
- Cost estimation/Pricing
- Accelerated proposal development

Delivery Module

With advanced **project tracking** and **finance** features to boost project visibility and control, the delivery module enhances decision making capabilities, improves efficiencies and helps deliver complex projects on time and on budget.

Key functionality

- Dashboards and reporting
- Best practice project controls
- Baseline and forecasting
- Resource management
- Invoicing and purchasing

Common pain points we hear from the engineering & consulting industry



We can't see Project problems coming. By the time we do, it's often too late

Why this matters

This results in negative commercial outcomes



Requirement

Accurate, simplified bid optimisation



Our sales and delivery systems are fragmented. Cost and sell rates not managed centrally

Why this matters

Proposals are issued with low margins. Slow business growth



Requirement

Scalable operations



Clumsy manual processes make reporting onerous and inaccurate

Why this matters

Clients get frustrated with lack of reporting accuracy



Requirement

Delivery excellence

Integrated Data : Enhance not Replace

Proteus connects to your existing ERP / CRM systems such Oracle and SAP to provide a fully integrated platform for consultancies that covers all the key workflows from sales right through to invoicing. Accurate planning, project, and finance data is accessible in real-time, and presented in a simple format for consultants to make decisions with. This stops teams from having to mine through different spreadsheets and tools to find the right data and brings everyone into one place.

The full project lifecycle, in one place



Integrated Project Data



Opportunities Bid/No-Bid



Pricing & Proposals



Project Controls



Delivery & Reporting



Project Experience



Opportunities

Certainty is crucial when it comes to bidding on a project. Proteus ensures that every opportunity is captured, improving the quality of your pipeline data. Proteus guides you through a stepped workflow to help you evaluate and decide whether a project opportunity is right for you. The five-step bid / no-bid begins with some basic questions, before moving on to analysis, the difficulty factor, winning strategy requirements, and risks. The questions in each stage are all accurately weighted and scored with the option to add additional notes. Throughout this process, key factors are analysed and all your decisions are recorded providing an auditable trail, and helping you improve your project win strategy. Proteus ensures consistency in your bidding process while minimising project bidding risk.



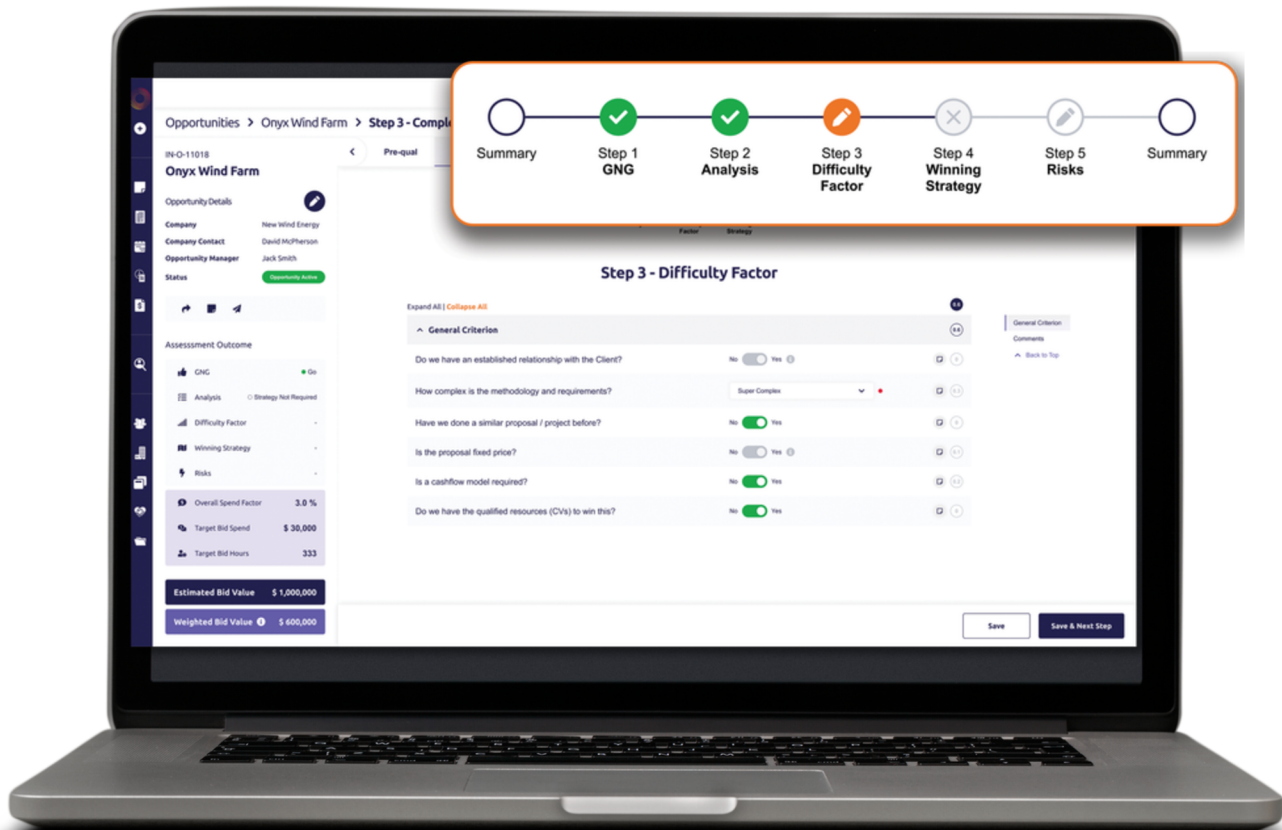
The big ticket questions are asked to determine whether a project opportunity should be taken further. If the answer to any of them is no, then you must seek advice or approval to progress. These questions can be adapted to suit your requirements.

Key factors are analysed e.g. number of competitors, expected margin, reimbursable or fixed price etc. The answers generate a score determining if further research is required.

Proteus helps you determine how difficult the proposal writing process will be and allocates time and budget accordingly.

This stage makes the user consider what is required to formulate a winning proposal whether it's budget, past experience, capability etc.

Examine all the possible risks and put preventive measures in place to reduce them.





Proposals

Proteus streamlines the proposal writing, pricing, and project planning process for any engineering consultancy. You can create a new proposal or you can convert an opportunity you have already created in Proteus into a proposal, automatically transferring all the information. Managing your proposals is simple. Once a proposal is set up, a configurable reference number is automatically generated and basic meta data is added. Being able to get a summary view of the status of all your active proposals is important. The index is organised to allow you to search, filter and find a proposal quickly. You can easily see the status of all your proposals with the mini-dashboard detailing the number of proposals in progress, win rate, and their values. Each component of the proposal is built in Proteus and integrated within a proposal template document in Microsoft Word, editable using drag and drop. AI supports these proposal writing features.



Work Breakdown Structure

At the heart of your proposals in Proteus is the Work Breakdown Structure (WBS) or Cost Time Resource (CTR). You use the WBS to build out the project plan with information including start and end dates, budget, milestones, team, resources, purchase costs, deliverables and ad hoc expenses. Formatted work packages can be added to the WBS hierarchy, providing you with a detailed, granular breakdown of the project work.

Multiple Contract Rate Cards

Proteus allows you to create your project budget based on pre-approved rate cards. The margin % is automatically calculated based on the difference between the selected charge out rate and the saved internal cost rate.

Proposal Templates

Proposal documents are created using Microsoft templates that are fully integrated with Proteus.

Proposal Components

A **GANTT chart** is automatically built into the proposal document based on the dates scheduled in each work package.

An **Org Chart** is created based on the team members added to each task and can be dropped into your document template.

A searchable database of **past project experience** allows you to drop in brief case study summaries.



Projects

Won proposals are easily converted into working projects populated with all the relevant information including budget and full WBS breakdown. Projects can also be set up from scratch. Pulling data from team timesheets and purchase orders or integrated tools such as Primavera or finance software, Proteus' delivery module gives you an accurate and reliable single source of truth for running your projects.

Resource Planning

The resource planning feature provides accurate details of the availability for each resource, this can also be viewed at the proposal stage helping you to manage team and client expectations. You can then allocate all project resources and the amount of time required for each separately. This enhanced visibility into resource availability prevents unforeseen resource limitations arising and costly delays.

Scope Changes

We understand that changes are common in projects. Any changes to your project can be added easily with our variation functionality. A summary of the effect of the variation on hours, cost items, margins is shown before it is applied. Proteus ensures that any changes whether it be to the project's scope, deliverables or budget are approved by the appropriate individuals helping to prevent scope creep.

Project Controls

Proteus enables proactivity amongst project teams with project controls features such as Earned Value Management allowing you to intervene before deviations from planned progress negatively impact your project. Access to real-time data and the ability to forecast accurately supports improved informed decision-making, and consistency with all team members using the same metrics.

Baseline & Forecasting

Proteus makes it easy to set up a baseline for your project which will be used as the basis for the project controls calculations. Approved variations are used to re-baseline. The baseline is used in the forecast calculations such as Estimate at Completion (EAC) and Variance at completion (VAC).

Project Dashboards

The Proteus dashboards use real-time data to display project progress, project performance, status of deliverables, margin and forecasts to give you unrivalled project control and visibility. The metrics and information displayed on your dashboard can be customised to suit your project's needs.

Project Reports

Automate your project reports with Proteus, share utilisation data with your managers and team on a weekly or monthly basis for each work package. Pull project details, key dates, project financials and variations into your document.



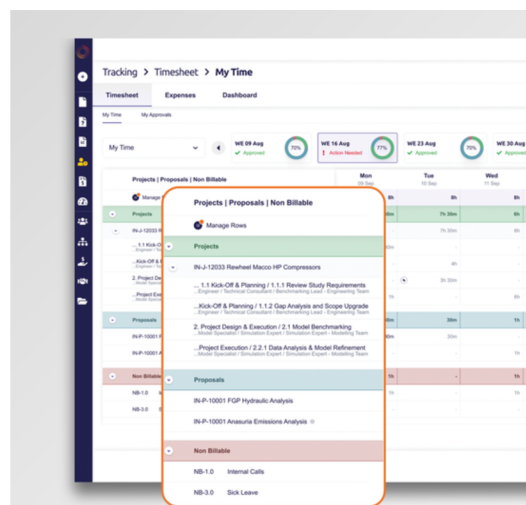
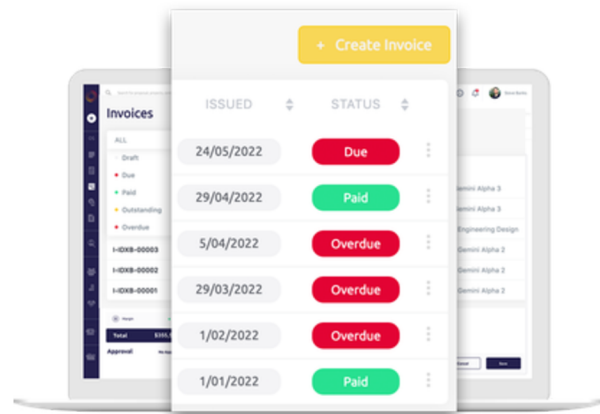
Transaction Management



With project costs, revenue and timesheets often managed across disconnected finance systems and spreadsheets, inaccuracies are common and project teams struggle to manage margins. Consultancies also struggle to give project teams access to key project finance workflows including procuring resources and tracking invoices, while late or incomplete timesheets reduce billing accuracy and limit reliable utilisation reporting. Proteus brings project finance and time tracking into one platform, giving organisations greater control and visibility over project finances and performance.

Project Finance & Procurement

You can easily create and track incoming and outgoing purchase orders, and manage invoices and payment schedules. Procurement of third party costs can be requisitioned, approved and finalised within the project environment. Proteus uses APIs to seamlessly integrate with existing finance software systems such as Xero.



Timesheets and Approvals

Proteus provides a simpler way to book, review and approve time. Users can easily select the proposal, project and non-billable codes that they have been assigned to and enter hours quickly using the intuitive table layout. Clear visibility of budgeted, booked and remaining hours helps teams stay on track, while the ability to duplicate previous weeks reduces repetitive admin.

Managers can review pending submissions, monitor budget impact, approve, reopen or bulk process timesheets in just a few clicks. Enhanced reporting features provide clear visibility of submitted, missing and approved hours across your business.

Proteus Databases

Proteus uses your data across all workflows. Key internal data like cost rates are stored securely in the Admin Console. Information used in proposal and project work is accessible from the main dashboard or can be pulled from integrated 3rd party software.

The **Team** database holds all personnel information, including employees, freelancers, and offline users. Detailed profiles are stored so you can easily add Organagrams and CVs directly into your proposal documents.

The **Companies** database holds information like addresses, contacts, and logos for clients and suppliers. This information can be easily attached to proposals, projects and invoices.

Data Security

Proteus ensures your data is protected, meeting the highest standards with ISO 27001 accreditation. Data is stored in your location and containerised. Specific additional security control solutions can be provided through bespoke development.

The **Assets** database is where you store any materials, software, and equipment that you use and charge out on a project. You can filter assets easily, add to a project, and track usage. If you use a third-party asset management system or software this can be integrated into Proteus so you can still add these resources to proposals and projects

The **Contracts** database holds all existing and active contract information, storing agreed charge out-rates. When planning your projects, this database eliminates errors as when you select the contract it automatically populates all of the key areas including expenses, payment terms, and mark-ups.



How to get Proteus

Proteus operates under a software-as-a-service (SaaS) model. We offer Enterprise packages and flexible pricing solutions. Contact our team to learn more.

We designed Proteus to be simple, and that means you can get up and running on Proteus without an IT team or support from a programmer. You will want to spend a bit of time configuring the admin console so that you have everything set up to suit your company structure, but it's very intuitive and you don't need a PhD in IT. However, we want you to get the best out of what is a brilliantly powerful tool, so don't hesitate to ask for our support. We have a team of product experts who are ready to help you with the configuration process, so get in touch today.

Customer Success & Development

Proteus has been designed to generate value for your company when you run projects. We are committed to delivering that value. Each Proteus customer is assigned a dedicated Customer Success Manager to ensure you achieve the value we know is possible. Our in-house team of developers builds custom APIs and functionality to provide you with a solution that uniquely fits your business model.



Proteus is developed by Xergy Group, based in the UK with offices in Dubai and staff working remotely across the world. We are a diverse, international team of engineers, developers, data specialists, customer champions and change-makers.

Our mission is to create world-class, innovative technology solutions that will transform business and create a lasting legacy.

Get in Touch

We're confident there is no other tool out there that will serve your needs in the way Proteus can. By simplifying and streamlining the complex project and cost performance management processes that companies currently run in silos on spreadsheets and clunky ERPs, Proteus adds huge value. **It improves profit margins, eliminates errors, and reduces business risk.**

Get in touch with our team of engineering project experts. You can book a demo and explore solutions. We provide consultation as a part of our service and we work with you to make a positive impact on your business.

Contact Us



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