The utilization of a pure-play professional services automation (PSA) solution can provide market-differentiating process and content automation, best-in-class analytics, and enterprise scalability with unmatched adaptability and performance. Here’s how services leaders optimize their organization with an actionable, automated, and enterprise-class PSA solution.
In the services world, a key to success is pairing the most competent and knowledgeable staff with the strongest technology foundation. And as every organization and company is different, configurability and ease of integration with your core systems (especially ERP and CRM) is a must.

You need the foundation of an enterprise-focused, pure-play professional services automation (PSA) solution for complex global services organizations in which business profitability is a focus. Each of the core capabilities your organization needs, work together in one solution to streamline the management of the entire services customer engagement lifecycle. From opportunity management, through tracking time and expenses, to recognizing revenue, to the integration with any CRM and ERP solution in the marketplace allows services organizations to increase productivity and operational visibility—resulting in greater profitability.

But putting in new systems and gaining staff advocacy is difficult—particularly when it seemingly disrupts practices that have more or less “worked” for years. Transitioning to a more optimized way of working can be game-changing for your services organization and your company’s bottom line.

Once the staff and infrastructure are in place, your mission should be the optimization of your services organization. A pure-play PSA solution helps services organizations (PSO) of every size manage the customer lifecycle, gain visibility into engagements, integrate with financial systems for real-time financial data, and provide faster revenue recognition. How? By embracing the unique capabilities of services automation that optimize every team member and process in each workday. Simply put: your services organization is actionable, automated, and enterprise-class.
**Work smarter, not harder**

Yes, you probably hear that a lot. In fact, in today’s transformative business arena, it’s likely a mantra. But when stuck with spreadsheets and manual processes, your level of effort definitely outweighs the outcome and is costing your company. Depending on the kind of information that is being tracked in spreadsheets—from task line items to financial data and formulas—large spreadsheets that manage a services engagement are hard to create, hard to manage, and almost impossible to maintain without mistakes. Data entry errors can be costly. Static spreadsheets are out of date within minutes of completion. And how many people on your team can quickly and accurately swizzle a roll-up report? It’s time to make it easier on yourself.

With a PSA solution, it’s not about taking humans out of the process, it’s about taking the human pacing and error out of it. Instead of waiting for laborious data entry and a piece of paper on someone’s desk to get signed, empower the players and streamline the process. Align your vital business systems and streamline the data capture of your organization’s key business metrics. Content automation improves data integrity and transforms data into any preferred business output. Intelligent Forms, found within Changepoint PSA, allow your business systems to interact and do all the heavy lifting, which eliminates cumbersome, error-prone processes and drives efficiency and productivity. This content automation digitally transforms your services organization’s business process complexity into automated, intelligence-driven, easy-to-use processes throughout the entire services engagement lifecycle.

**Bring it in, team**

Work is easier when systems talk to one another. If your services organization is relying on multiple, disconnected systems to manage the engagement lifecycle, then there’s likely a bottleneck in workflow, multiple data entry, and siloed information. And with financial data, you can’t risk disconnected steps and duplicate data entry—or understanding the financial health of engagements is jeopardized. And the biggest disconnect of all: on-premise solutions require more resources, time, and energy just to barely keep up with business. It’s time to huddle, get the play, and then play the game like a professional sports team: fine-tuned, efficient, and fast.

With seamless bi-directional CRM and ERP integrations, you can connect your services organization’s mission-critical systems and consolidate business data to decrease the complexity of revenue recognition and provide a single source of truth without multiple logins.
Moving from on-premise systems to cloud-based solutions enable IT departments to spend less time on support and maintenance and more time on innovation, which is critical in today’s business climate. Operating a secure, dedicated, enterprise-scalable cloud that gives your organization control over the entire PSA solution. With Changepoint Private Cloud, your PSA solution is seamlessly tailored to your business needs, increasing your business agility—making your organization more efficient, cost-conscious, and a more valuable partner to clients.

**Make sure to see the forest for the trees**

Executive visibility into the business ultimately validates your organization’s contributions and value to the business—not to mention, helps leadership to make informed business decisions. But transparency and communication—both of which are inextricably tied—are sacrificed when working in disconnected systems. This lack of real-time visibility into the business negatively impacts cash flow management, margins, and maintaining positive, long-lasting customer lifecycles. It’s time to dial in to the big picture, on demand.

Service leaders rely on best-in-class business intelligence (BI), powered by augmented intelligence (AI) that increases real-time transparency and visibility into the quote-to-cash cycle. Changepoint BI provides a secure platform of configurable dashboards and reports with drill-thru visibility for business-critical analytics. With Augmented Intelligence (AI), key stakeholders and executives can harness powerful capabilities that include smart exploration and storytelling. The output is useful visualizations and intelligent pattern detection to help uncover previously unknown insights for better business decisioning.

**Show me the money**

No, we’re not quoting Jerry Maguire—we’re referencing your road warriors. When services consultants, managers, and execs use napkins, sticky notes, or worse—commit their hours to memory—your bottom line suffers. Asking consultants to wait until they are back in the office or have connectivity in order to document their billable hours is a fast track to inaccurate data. And when the data is incorrect, so is customer billing. You need to more accurately gage non-billable and billable expenses and avoid cost allocation leakage due to late or inaccurate expense reporting by consultants. It’s time to streamline your services team efficiency with a mobile time and expense app.
Mobile connectivity is called “mobile” for a reason: anywhere, anytime, the world and all its news, music, and binge-worthy shows are accessible via a small, hand-held device. And obviously, services teams benefit the most. Managers can quickly communicate with consultants and more accurately gage non-billable and billable expenses to date. Consultants are encouraged to report time and expenses as they happen, avoiding late or inaccurate expense reporting and the resulting cost allocation leakage. With offline access, expenses can be entered any time, and services leaders can get timelier and more accurate customer billing—resulting in improved cash flow.

Relying on spreadsheets, manual processes, and disconnected systems is a recipe for disaster with today’s rate of change. Evolution in technology is requiring firms to update processes while also updating their clients’ technology and processes. That’s a lot to manage. However, the alternative for a modern PSO without the right people and technology in place is flat, declining revenues, lower margins, and ultimately, unhappy customers. It’s time to change the dynamic and optimize your services organization.

Changepoint’s enterprise-scalable PSA solutions accelerates complex processes with intelligence-driven automation and offers actionable insights with best-in-class business analytics that makes services organizations more financially successful.

With a comprehensive pure-play PSA solution, services leaders are able to have real-time visibility into financials, resources, and engagements through robust CRM and ERP integrations, and powerful features that automate processes and help the organization work smarter. PSA helps manage the entire customer lifecycle—from order to cash— and makes it easier to manage engagements and drive stronger margins. Optimize your organization—its people, processes, and technology—with an actionable, automated, and enterprise-class PSA solution. With it, you and the entire company will benefit from increased productivity, operational visibility, and greater profitability.
Changepoint PSA

Changepoint is a pure-play professional services automation (PSA) solution for global enterprise services organizations that powers the entire services engagement lifecycle. Changepoint PSA allows services leaders to better manage their organization by providing real-time visibility into financials, resources, and engagements through robust integrations with existing enterprise CRM and ERP systems—resulting in increased productivity, operational visibility, and greater profitability.

About Changepoint

Changepoint provides Program and Portfolio Management, Enterprise Architecture, and Professional Services Automation solutions that transform business by giving executives, management, and teams new ways to collaborate, align investments, and drive digital transformation and business growth. Our global customers transform chaos into order with solutions that help teams prioritize initiatives and get the job done. Whether you’re managing a portfolio of projects, engagements, or applications, Changepoint helps you gain visibility, mitigate risk, and accelerate capacity and velocity in today’s changing business landscape.