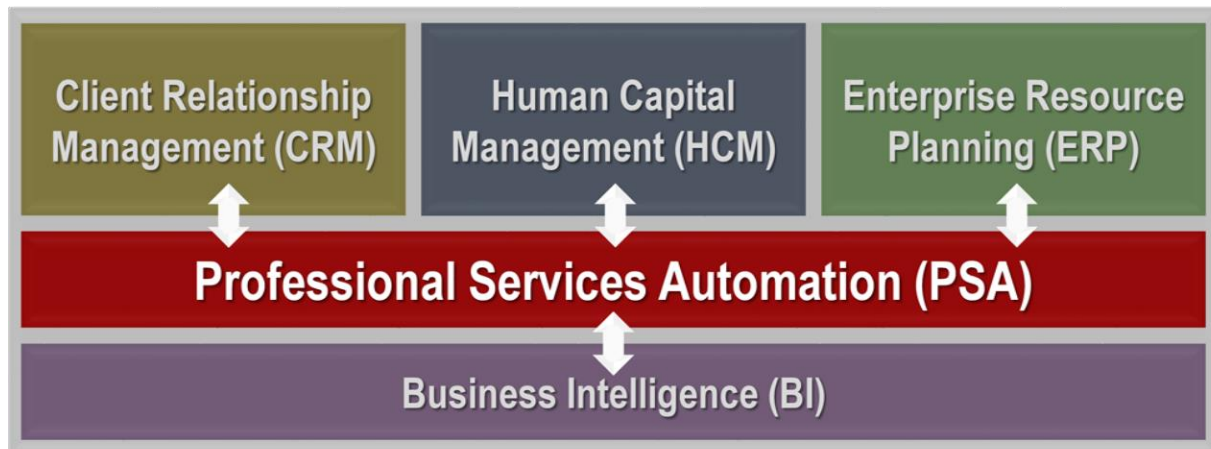


# Service Performance Insight, LLC

## Professional Services Automation (PSA) Buyer's Guide



November 2014

## Service Performance Insight

Service Performance Insight (SPI Research) is a global research, consulting and training organization dedicated to helping professional service organizations (PSOs) make quantum improvements in productivity and profit. In 2007, SPI Research developed the PS Maturity Model™ as a strategic planning and management framework. It is now the industry-leading performance improvement tool used by over 10,000 service and project-oriented organizations to chart their course to service excellence.

The core tenet of the PS Maturity Model™ is service organizations achieve success through the optimization of five Service Performance Pillars™:

- **Leadership** – *Vision, Strategy and Culture*
- **Client Relationships**
- **Human Capital Alignment**
- **Service Execution**
- **Finance and Operations**



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## 1. INTRODUCTION

The growth engine of the world's economy has shifted from manufacturing to project-based, people-centric services businesses. These businesses rely on Professional Services Automation (PSA) solutions to manage resource scheduling, time capture and billing. PSA automates core business processes such as quote-to-cash, resource management and time capture and billing. It provides the real-time visibility necessary to improve organizational efficiency and effectiveness.

Globalization, centralization, modernization and streamlining operations are the key drivers for continued PSA investment among large project- and services-based organizations. But the service industry is dominated by small and midsize firms; their growth has consistently outpaced the overall market. According to Service Performance Insight's (SPI Research) extensive service economy research, 30% of more than 1,500 organizations surveyed have not yet invested in a PSA solution. Small and mid-size organizations still rely on spreadsheets to manage resources and capture time and expense. Firms of all sizes are buying new PSA solutions to replace legacy, on-premise solutions and to consolidate a hodge-podge of point solutions, spreadsheets and email schedules onto a single platform.

This PSA Buyer's Guide provides an overview of important trends, business processes and selection criteria to help project- and services-based businesses evaluate and choose PSA applications, which will provide the level of insight, management and control needed to improve productivity and profitability.

### PSA defined

SPI Research defines Professional Services Automation (PSA) as:

***A software solution used to increase operational visibility  
and improve process efficiency in project- and services-driven organizations***

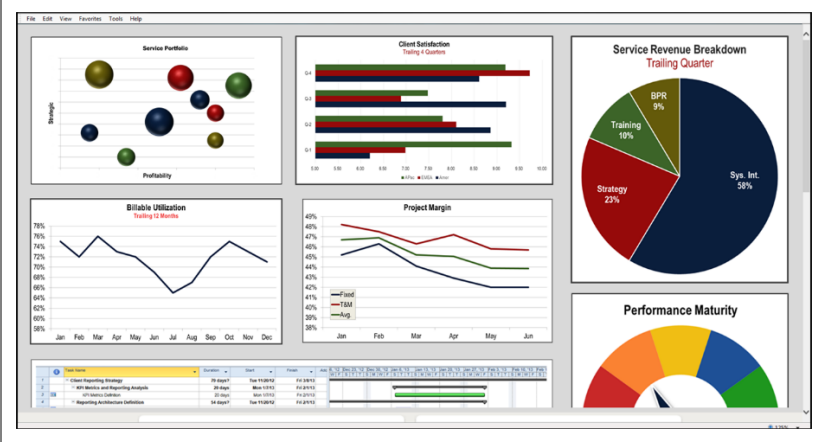
Professional Services Automation provides organizations with a solution to efficiently plan, sell, execute and charge for work. PSA gives team members the tools to collaborate and collect knowledge that can be further used to optimize business processes. The net effect of PSA is a more productive and profitable business, as well as improved levels of predictability and client satisfaction.

PSA solutions included a common enterprise-wide project and resource database with various application modules to support fundamental business activities, such as resource scheduling, project management and project accounting. A PSA solution is used to standardize business processes and provide reports, insight and control for resources and projects. The value of such a system is to enable critical information to be analyzed and shared across the organization for more insightful and timely decision-making.

## What makes PSA different?

Services firms are uniquely people-driven organizations. They depend on the knowledge and skills of a talented workforce to sell, staff and deliver a range of services typically on a project or contract basis. The fundamental requirements of service-based businesses are very different from classic manufacturing and supply-chain focused scheduling applications as they must include functionality for managing resources (people) and projects (tasks). Increasingly, PSA solution providers also add rich project and opportunity management capabilities to support deal capture, resource scheduling, and project delivery.

**Figure 1: PSA Solutions Dashboard**



## PSA has become mission critical

Stand-alone PSA solutions started to appear in the late 1990s. Over the past fifteen years project accounting, resource management and time capture and billing modules have been added. Support for specialized billing methods and complex revenue recognition rules for time and materials, work-in-process, deliverables-based or percentage completion are also important PSA extensions.

A key performance driver is “out-of-the-box” integration between PSA and financial applications for greater visibility and management control. Modern systems provide consistent, powerful reports and dashboards giving team members the information they need to make informed decisions.

In the early years, PSA was primarily focused on optimizing the delivery of project-driven services. These solutions included integration between resource and project management, capturing much needed information on the time and cost of doing work. As the market evolved, solution providers began to add functionality that helps PSOs sell services, collaborate during their execution, and accurately invoice in a timely manner. Integration with back-office financial systems, client relationship management, human resource solutions and procurement has become an essential PSA benefit.

As PSA solutions have gained acceptance and importance, the demands placed upon them have become increasingly complex and critical to organizational success. Fifteen years ago Professional Services Automation was a term that very few in the industry understood. Now executives at leading firms understand PSA’s potential — but inertia and cost still deter wholesale market penetration. A critical

decision for most firms is whether to implement a standalone PSA or purchase a project-based financial system. There are pluses and minuses with each approach.

## Market trends

The business model for many professional services organizations has begun to change. Just a decade ago, a majority of firms operated primarily with a time and materials engagement structure. Now, almost half of all projects are based on a fixed-time / fixed-fee structure as client organizations demand greater predictability, accountability and value for their services spend. SPI Research notes that this trend toward fixed-time/fixed-fee engagements creates two potential inefficiencies:

- △ The first is under or over utilization of employees. In any type of engagement, PSOs strive to maximize workforce utilization. Fixed-fee engagements put the onus of managing time and scope creep on the service provider. It is paramount that the firm maintains a high level of utilization in order to complete the work on time and avoid overage penalties;
- △ There is also a risk associated with inaccurate project planning and execution. PSOs can either overestimate the amount of time and cost to do the work and therefore reduce the probability of winning the engagement; or they can underestimate the time and cost and therefore run the risk of an unprofitable engagement.

Both of these scenarios reduce profit margins while damaging client satisfaction. The movement to a fixed-time/fixed-fee pricing structure puts increased pressure on planning accuracy and operational efficiency.

## Strategic considerations

The selection of a PSA application is one of the most important investment decisions most organizations will make. Not to be taken lightly, the evaluation should include both current and future business requirements along with an understanding of market conditions and technology trends.

Within project- and services-based businesses, the core work is accomplished by self-managing work teams that quickly come together to accomplish specific tasks. Staffing, managing and collecting time and expense and billing for projects is the principal

**Figure 2: Success depends on inter-departmental cooperation**



functionality required by project-centric organizations. PSA solutions must provide visibility into project accounting with budget-to-actual comparisons for both costs and revenue. These organizations also require powerful tools for planning, reporting and budgeting which support trend analysis and “what if” scenario and resource capacity planning.

Choosing a new PSA solution is a major decision. Clearly defining requirements and fundamental business processes helps prioritize “required” versus “nice-to-have” functionality. Strategic considerations driving PSA decisions include:

- △ **Executive:** Leaders in project- and services-based organizations must constantly refine their strategies to remain competitive and to attract the “best and brightest” talent. Leading performers in SPI Research’s annual benchmark studies tend to be focused on high-growth niche areas, industries or particular business processes. This specialization enables them to focus on building differentiation and depth in their portfolio.
- △ **Marketing and Sales:** Marketing and sales is, and always will be critical to success in any type of organization. The need to offer greater repeatability in service offerings has given rise to productized (packaged) services. This emphasis enables project- and services-based organizations to sell services more like products, with less variability in the time and cost necessary to deliver the service, along with higher levels of differentiation and quality.
- △ **Human Resources:** Project- and services-based organizations have reported it has become increasingly difficult to find, hire and retain qualified personnel, especially those with critical skills in science, technology, engineering and math (STEM). The emerging “*talent cliff*” has caused project- and services-based organizations to concentrate more intensely on employee-related issues.
- △ **Service Delivery:** Limited resources, higher employee costs, more demanding clients and shorter project durations have forced project- and services-based organizations to improve project and service delivery. Building repeatable project and quality processes has become vital.
- △ **Accounting and Finance:** Project- and services-based organizations have become more complex. Geographic expansion, increased numbers of mergers and acquisitions and greater regulatory scrutiny dictate the need for better operational visibility and control. This additional level of control mandates the need for a global information infrastructure.

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### Technology trends

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SMAC (social, mobile, analytics and big data, and cloud) is a new acronym for the technology trends dominating the services landscape in 2014. SMAC and its underlying technologies have caused a seismic shift in technology buying. Power and control have shifted to employees and business executives, away from the IT domination of the past. Social media-fueled buying behaviors and perceptions have eclipsed IT-centric product and feature selling. These new technologies have ushered in a wave of employee and line of business buying power.

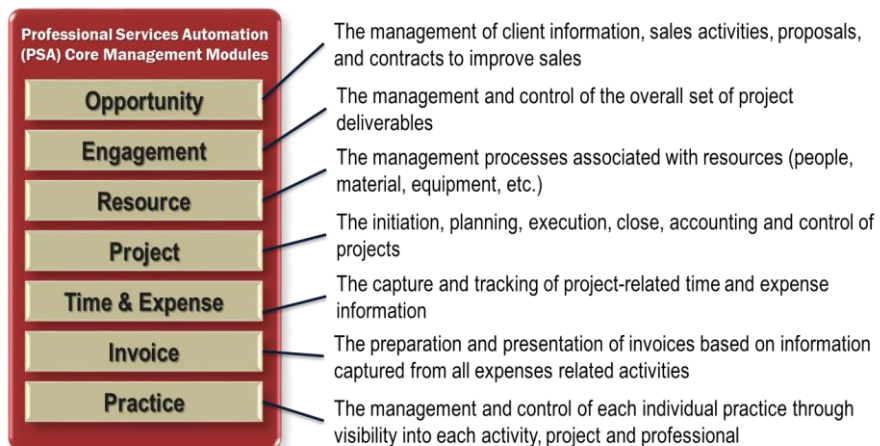
- △ **Social:** Buyers expect new applications to be socially aware, with Facebook-like functionality for crowdsourcing, instant messaging and telling a friend. Built-in connection and integration with the major social channels is becoming mandatory.

- △ **Mobile:** Support for a variety of mobile devices is no longer a “nice to have,” but a “gotta have,” meaning vendors must offer out-of-the-box integration and support for iOS and Android devices while supporting emerging mobile standards.
- △ **Analytics and Big Data:** Much has been said and written about big data, especially as a means for legacy enterprise application providers to remain relevant. The answer lies not only in access to massive, virtual storage, but also in developing a workforce that can understand and use statistics to power business decisions. Analytic engines and technology often surpass the analytic skills and competencies of business users who have to make sense of it all. Graphical reporting, dashboards and availability of out-of-the box management reports have become mandatory.
- △ **Cloud:** The debate over cloud-based applications is over. The market has accepted and embraced the new software as a service model. Every leading provider of enterprise applications is now focused squarely on the cloud. Although typically smaller, and less expensive, today five cloud-based solutions are sold for every one on-premise solution.

## 2. PSA MODULES

**Professional Services Automation** provides the systems basis for initiation, planning, resource management, scheduling, execution, close and control of projects and services. PSA provides a resource and project dashboard including the demand forecast. It helps manage service delivery by overseeing opportunities, staffing, project management, and collaboration. PSA is typically the system of record for resource skills, competencies and preferences with integration to the employee and contractor database. It is used to collect time and expense by project and resource down to the task level so it is the system of record for resource utilization and project cost and estimating. Most PSA applications now offer billing modules with some level of revenue recognition by type of billing method – time and materials, work in process or fixed price. They also support accurate time and expense capture. PSA extensions for the construction industry include modules for material costs and procurement.

**Figure 3: PSA Solution Modules**



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## Core modules

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PSA vendors segment their products into application modules that emphasize the management of costs, clients and resources:

- △ **Opportunity Management:** The management of client information, sales activities, proposals, and contracts to improve sales effectiveness. Some PSA solutions let a CRM tool handle opportunity management; and instead focus on resource demand management and forecasting functions based on the opportunities tracked in the CRM application.
- △ **Engagement Management:** The management and control of the overall set of project deliverables.
- △ **Resource Management:** The management processes associated with resources (people, material, equipment, etc.) used during the services delivery lifecycle.
- △ **Project Management:** The initiation, planning, execution, close and control of projects.
- △ **Project Accounting:** The tracking of project-related costs to determine budget to actual costs and profitability.
- △ **Time and Expense Management:** The capture and tracking of project-related time and expense information.
- △ **Invoice Management:** The preparation and presentation of invoices based on information captured from the time and expense module or from pre-assigned time or project completion milestones.
- △ **Practice / Management Reporting:** Core reports include project dashboards, resource management and utilization dashboards, capacity planning and forecasting, project profitability, etc.

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## Additional modules

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While every PSA solution is unique, some have expanded their capabilities through additional modules. Additional modules include:

- △ **Social:** The ability to easily incorporate social channel information from LinkedIn, Facebook, Twitter, etc. along with social collaboration to facilitate knowledge sharing.
- △ **Collaboration Management:** The management of information used to create effective communication and iterative knowledge sharing during the services delivery lifecycle.
- △ **Knowledge Management:** The centralization of information improves operational efficiency. This information can be anything related to the ongoing business and includes information on resources, projects, capital and clients.
- △ **Revenue Management:** PSA solutions provide deferred revenue and work in progress tracking and revenue reporting to automate revenue reporting for time and materials, fixed bid, milestone-based and term engagements.

- △ **Performance Management:** The use of information to determine effectiveness and budget to actual performance for different aspects of the organization.

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## 3. PSA BENEFITS

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Each year SPI Research's [Professional Services Maturity™ benchmark](#) quantifies the benefits achieved by services organizations with solutions that integrate Client Relationship Management and financial processes, Human Capital Management and financial processes, and Professional Services Automation and financial processes. Of course, the systems themselves are only part of a broader firm-wide commitment to behavioral change that fosters collaboration and enhanced communication, coordination and quality management.

When it comes to PSA software, project- and services-based organizations now have a range of attractive choices – systems that are designed to support the needs of the always-on, virtual, mobile service economy by providing a number of key benefits:

- △ Project revenue and cost data is contained in a central database.
- △ The user interface is consistent across all applications.
- △ Costs and deliverables reside in the same place so productivity can be measured, analyzed and improved at the territory, account, project and individual resource level.
- △ Reporting and analytics are embedded within the application, alerting decision-makers to issues before they become problems.
- △ A more seamless audit trail to better identify success and failure points.
- △ Enhanced support for global operations with multicurrency, multilingual applications, which conform to local regulations and taxes.
- △ Lower administration costs due to fewer manual, error-prone spreadsheets and costly data re-entry.
- △ One-source of the truth – real-time information visibility, constantly updated.

There are many more benefits provided by integrated PSA solutions. It is intuitively obvious that with one consistent set of information, decision-makers have the visibility and control they need to improve organizational performance.

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## The case for PSA

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After 15 years of research on the performance of PSOs, the benefits speak for themselves. Service Performance Insight research, highlighted in the [2014 Professional Service Maturity™ Benchmark](#) provides an example of how PSOs have improved performance in all areas when professional services automation has been deployed. PSA provides the necessary visibility to efficiently run projects with fewer overhead resources, resulting in better resource management and profit.

Table 1 shows a few of the most critical key performance indicators (KPIs) and how adopting a PSA can affect them. While increased billable utilization tends to be the primary measurement, there are many other metrics positively impacted by these applications.

PSOs can manage the business with lower administrative overhead and deliver more projects on time, driving better financial performance. The bottom line is that organizations that use a PSA solution grow faster, are much more profitable, and simply operate far more efficiently.

Service Performance Insight's research into PSA also highlights many qualitative benefits, some of which include:

**Table 1: PSA offers significant benefits**

Key Performance Indicator (KPI)	PSA Used	No PSA Used	▲
Employee utilization	75.7%	72.0%	5%
Year-over-year change in PS revenue	10.1%	8.4%	19%
Concurrent projects managed by PM	5.37	4.55	18%
Projects delivered on-time	77.1%	75.1%	3%
Projects canceled	1.7%	2.6%	32%
Annual revenue per billable consultant (k)	\$216	\$192	12%

Source: Service Performance Insight, November 2014

- △ Improved time and expense processing
- △ Improved management effectiveness
- △ Increased resource utilization
- △ Improved forecasting capabilities
- △ Improved project effectiveness
- △ Improved communication and collaboration
- △ Improved client satisfaction
- △ Improved resource investments
- △ Reduced revenue leakage
- △ Reduced total administration costs

## PSA benefits other areas

With almost 80% of the PS cost structure is predicated on people; it is imperative that PSOs utilize personnel to their fullest capacity. SPI Research notes that even though PSA solutions have the greatest impact on billable resources, the effect on non-billable resources can also be significant. Non-billable personnel support strategy, sales and marketing, operations, recruiting, quality management and finance and administration. These individuals must have the tools to understand, support and improve the delivery of high quality services. The following bullets highlight a few areas where PSA can improve productivity for non-billable personnel:

- △ Planning, forecasting and budgeting.
- △ Estimating, proposal generation and service packaging.
- △ Operations including capacity management, recruiting, hiring and training.
- △ Project, revenue and cost analysis to determine which types of projects and clients best fit the organizational strategy and objectives.

- △ Reduced finance and administration time for data input, cleansing, invoicing, analysis and reporting.
- △ Trend analysis to support planning and decision-making.
- △ Knowledge capture and sharing to improve delivery effectiveness.
- △ Project quality management, engagement satisfaction and improved project management.

## Organizational visibility

Perhaps the most noteworthy benefit is that of collaboration and visibility — a primary driver of PSA sales. While many firms look to more tangible benefits such as improvements in utilization and decreased revenue leakage, it is the increase in visibility that allows management to take a closer look at the organization to determine improvement priorities. Professional service profitability relies on a consistent balance between demand and supply; PSA's primary benefit is providing organizational visibility to support having the right resources at the right time for the right type of projects.

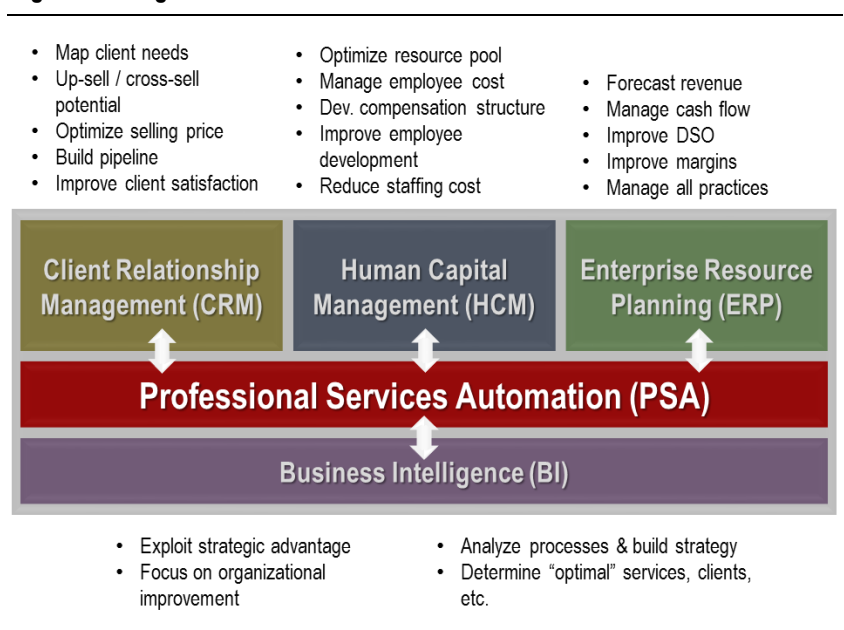
The implementation of PSA also helps consolidate and reduce the total number of enterprise systems (time and expense capture, project management, project scheduling, etc.). This consolidation aids the organization in a variety of ways:

- △ PSA reduces the cost to maintain additional applications.
- △ It reduces integration costs and increases enterprise visibility “out of the box”.
- △ It provides “one source of the truth” to support timely decision-making.
- △ It provides consistent templates and definitions to support key performance measurement and improvement.
- △ PSA reduces the amount of training required for individuals to become competent with multiple information systems.

## The benefits of PSA integration

Although standalone PSA solutions provide significant benefit, the rewards are amplified when PSA is integrated with the organization's financial management application. PSA financial integration enhances visibility and management control. It

**Figure 4: Integrated PSA Benefits**



supports “open books” to give all team members one source of the truth so they are empowered to ensure their actions have a positive impact on the bottom-line.

Integration enhances visibility and makes the firm more agile because decisions are based on fact, not intuition. Fact-based decisions help align firms around the types of projects, clients and markets where they excel.

Table 2 compares organizations owning PSA, but not having it integrated with the core financial management solution, to those organizations using PSA combined with financial integration.

**Table 2: Integrated PSA Improves Service Performance**

Key Performance Indicator (KPI)	Integrated	Not Integrated	▲
% of total revenue from new clients	32.0%	27.7%	16%
Pipeline relative to quarterly bookings forecast	236%	202%	17%
Projects canceled	1.6%	1.8%	8%
Standard delivery methodology usage	69.0%	55.7%	24%
Annual revenue per billable consultant (k)	\$223	\$204	9%
Annual revenue per employee (k)	\$178	\$165	8%
Billable utilization	75.3%	73.3%	3%

Source: Service Performance Insight, November 2014

## Is a PSA solution needed?

There are a number of important challenges faced by organizations that have not yet implemented an integrated PSA solution:

- △ Disconnected spreadsheets and legacy applications cause manual rework leading to inaccuracies and lost billable time and expense.
- △ Manual time and expense collection and re-entry for financial reporting cause delays in billing and invoicing inaccuracies which contribute to delayed payments and cash-flow issues.
- △ Lack of visibility to budgeted versus actual time and expense causes client dissatisfaction and contributes to runaway projects.
- △ Silo'ed regional or practice databases prohibit sharing of critical client and project information.
- △ No reporting or real-time information on project status means no visibility to project profitability or the timely ability to request change orders.
- △ Poor user interfaces impede mobile consultants from entering time and expense leading to lost productivity, non-billable time and expense and employee dissatisfaction.
- △ Inadequate visibility to current and future projects causes poor resource utilization resulting in substandard billable utilization and revenue yield per person.
- △ Lack of visibility to required resources impedes recruiting and ramping of new consultants.
- △ Because resources have no visibility to planned or future projects they have no control over their schedule or the types of assigned projects leading to employee dissatisfaction.

The bottom-line is it is almost impossible to run, scale and grow a high-quality professional services business without an integrated Professional Services Automation platform.

**Figure 5: PS Maturity™**



The primary driver of PSA selection is real-time visibility and control of the financial aspects of the business. If the answer is “yes” to the following questions it may be time to consider a PSA purchase.

**Table 3: Is it time for PSA?**

Y/N	Question
	Have you outgrown your current systems? Do you have more than 20 employees?
	Are your current project management and time and expense capture applications outdated and expensive to update and maintain?
	Have you or are you planning to expand globally? Can you support multinational currencies, regulations and taxes?
	Is it important to have access to information in real time? Do departments need to share information to better plan and execute?
	Does it take too long to manually collect time and expense to bill clients? Are invoices inaccurate making it hard to collect?
	Does it take several days to manually close the books?
	Do you have visibility to the sales pipeline and project backlog to quickly and accurately forecast demand?
	Do you know “most in demand” skills and can you forecast demand to begin recruiting?
	Do you look to improve service sales and service delivery consistency? Are you ready to adopt consistent sales and delivery methods?
	Has assigning resources and managing projects by spreadsheet and email become overwhelming?
	Do you have low utilization levels (or do you even know your billable utilization)?
	Do you know your project margins (by client, practice, region and consultant)? Are they acceptable?

## 4. CORE BUSINESS PROCESSES

The power of modern PSA solutions is that they provide workflow, rules, alerts and reporting that mimic best practices in business management. Decades ago services businesses had few viable options as they were forced to build their own, or substantially customize manufacturing-oriented applications, to handle projects and resources. Now, the PSA providers highlighted in this Buyer's Guide provide modules that support essential business processes, including the critical “quote-to-cash” process.

Figure 6: Primary business processes cross multiple departments



PSA solutions are designed to integrate core business processes across the organization so that each department has a clear understanding of their specific goals and measurements and how they ultimately impact the organization's ability to succeed. Success can be defined in many terms, such as growth, profit, quality, streamlined operations or reduced administration and rework. Regardless, when everyone works with the same set of information and is focused on the critical path to complete project-based work, results tend to improve.

***The most important reason why project- and services-based organizations purchase integrated PSA solutions is their ability to support and streamline business processes across the entire organization.***

No longer can solutions only provide visibility into specific functions. Now, as each department adds value, the business processes that enable success must be mirrored in the PSA solution. The following sections highlight two of the most critical business processes within project- and services-based organizations: 1) *quote-to-cash*, and 2) *resource management*.

## Quote-to-cash business processes

In today's economy, cash flow rules. Every organization must focus on cash flow to maintain a solid financial position and maximize profitability and liquidity. In service-oriented organizations this process begins with a client quote and ends once payment is received and the money is in the bank. This macro process of converting sales opportunities into paying customers is often referred to as "quote-to-cash," and its optimization is essential for financial well-being.

Figure 7 shows quote-to-cash is a series of interrelated processes supported by client relationship management (CRM), PSA and

Figure 7: Quote-to-cash process



enterprise resource planning (ERP) modules. To optimize these fundamental business processes, executives rely on the integration of essential business applications to provide visibility, transparency and control. Although each of these applications are offered on a stand-alone basis, the true power of managing the complete quote-to-profit business cycle is best accomplished by integrating best of breed applications together or purchasing an integrated suite of applications.

## Resource Management business processes

One of the most important elements of service execution is resource management and scheduling. Service Performance Insight has developed a “Resource Management Maturity Model” shown in Table 4. Key aspects of effective resource management include:

- △ **Sales Pipeline:** Integration of the sales project pipeline with resource requirements and availability.
- △ **Resource Management:** The process for scheduling and deploying resources. Resource management can be centralized or decentralized.
- △ **Functional Interlock:** Alignment between the sales project pipeline, the resource management process, the recruiting process, the human resource onboarding and skill development process and the resources themselves.
- △ **Human Resource Processes:** Recruiting, onboarding, ramping, and resource skill development.
- △ **Resources:** The consultants and contractors available to deliver projects and engagements.

**Table 4: The Resource Management Maturity Model**

	Level 1 Initiated	Level 2 Piloted	Level 3 Deployed	Level 4 Institutionalized	Level 5 Optimized
Service Execution	No scheduling. Reactive. Ad hoc. Heroic. Scheduling by spreadsheet. No consistent project delivery methods. No project quality controls or knowledge management.	Skeleton methodology in place. Beginning to centralize resource mgmt. Initiating project mgmt. discipline. Starting to measure project satisfaction and harvest knowledge.	PSA deployed for resource and project management. Collaborative portal. Earned value analysis. Project dashboard. Global Project Management Office, project quality reviews and measurements. Effective change management.	Integrated project and resource management. Effective scheduling. Using portfolio management. Global PMO. Global project dashboard. Global knowledge management. Global resource management.	Integrated solutions. Continual checks and balances to ensure superior utilization and bill rates. Complete visibility to global project quality. Multi-disciplinary resource management.
Sales Pipeline	Sales pipeline and forecast is disconnected from scheduling. Reactive or no sales resource demand forecast or plan.	Standalone CRM and resource forecast. Limited visibility into resource schedule or available skills.	CRM and resource management applications deployed. Sales starts forecasting future resource and skill requirements by engagement.	Fully integrated CRM and Resource management. High levels of pipeline forecast accuracy. Ability to dynamically and automatically map the sales forecast to resource requirements.	Optimized and integrated CRM and resource management. Sales visibility into resource availability and skills. Strong analytic and query tools.
Functional Interlock	Reactive resource brokering and bartering. Sales picks and commits resource “favorites.” Time-consuming manual scheduling.	Weekly resource brokering meetings to assign resources and discuss future projects and resources requirements.	Centralized resource management function handles the majority of resource requests and schedules. At least manual integration between CRM and PSA.	Centralized resource management function handles resource requests and schedules. Integrated with HR for recruiting and resource skill development.	Completely optimized and seamless sales -> resource management -> recruiting -> skill and career development processes.

	Level 1 Initiated	Level 2 Piloted	Level 3 Deployed	Level 4 Institutionalized	Level 5 Optimized
Consulting Resources	Reactive and ad hoc scheduling. No visibility to future projects. No career or skill plan. Broad job requirements but limited training or support. Firefighting leads to consultant burnout.	Project initiation and closeout processes. Some visibility into future projects. Some ability to plan and express project preferences. Training support to improve skills.	Central PMO and resource management provide methodology guidance and oversight. Ability to input skill and role preferences. Visibility to upcoming projects. Reasonable notice given for schedule changes. Integrated career & skill development plans.	Fully integrated systems and tools to support career and skill growth. Self-service employee portal allow employees to continually maintain and update skills and preferences. Visibility to preferred assignments. Career planning and training. Predictable schedule.	Global, on-site, off-site roles. Ability to view and bid on preferred assignments. Employees have input to and control over their career and skill progression. Specialized horizontal, vertical and technical roles. Career growth. High employee satisfaction.

Source: Service Performance Insight November 2014

## 5. PSA VENDOR OVERVIEW

Rapid growth and change in the professional services industry and other project- and services-based businesses demands a comprehensive information infrastructure. SPI Research's seven years of PS Maturity™ benchmarking has shown increasing adoption of business solutions and other analytic and collaboration tools to improve operations, effectiveness and cash flow. Recently, greater emphasis has been placed on "social," enabling workers to communicate, collaborate and build their own personal brand and communities within the information infrastructure. Both small and large project- and services-based organizations have embraced cloud PSA solutions as they are a good fit for the mobile, virtual world of services.

### PSA solution providers

Well over 50 software solution providers claim some level of PSA functionality, but very few demonstrate the comprehensive solutions required to support all aspects of a professional services organization. Table 5 highlights nine of the leading providers today that provide comprehensive Professional Services Automation solutions. Each has strong resource management and project management capabilities. They all target both independent and embedded professional services organizations while providing integration tools to leading CRM and ERP applications.

**Table 5: PSA Solution Providers**

PSA Solution Provider
<p><b>Changepoint</b> (<a href="http://www.changepoint.com">www.changepoint.com</a>) headquartered in <b>Toronto, Canada</b> was sold by Compuware to private equity firm, Marlin Equity Partners in 2014 for approximately \$160M. In August the firm acquired the Daptiv PPM (Project Portfolio Management) cloud-based solution. Changepoint has been delivering corporate businesses professional services software and IT management solutions for more than 20 years. For services leaders and their teams, Changepoint handles every aspect of the services business from client acquisition, to services delivery, through to financial control and management. The professional services software allows teams to drive strong margins; better manage projects; optimize resources; deliver a competitive product and services mix; and maintain top-line revenues and bottom-line profitability.</p>
<p><b>Clarizen</b> (<a href="http://www.clarizen.com">www.clarizen.com</a>) headquartered in <b>San Mateo, California</b> and <b>Hod Hasharon, Israel</b> was founded in 2006 and delivers PSA and PPM solutions to over 2,500 organizations across 76 countries, including dozens of the Fortune 500. Clarizen offers <a href="#">professional services organizations</a> an enterprise-class solution for work collaboration and project management, which harnesses the power of the cloud and social engagement to get work done on time and on budget. The highly configurable solution provides social context around tasks, resources, time tracking, expenses, projects and more, on a single platform. Clarizen integrates with Salesforce.com, Intacct financial accounting, Box cloud-based storage and collaboration, and many additional solutions.</p>
<p><b>FinancialForce.com</b> (<a href="http://www.financialforce.com">www.financialforce.com</a>) headquartered in <b>San Francisco, California</b> delivers PSA and financial solutions built on the Salesforce1 Platform. The vendor equips customer-centric businesses with a unified cloud platform with all the applications necessary to grow both the top and bottom line. Besides PSA, FinancialForce offers <b>Financial Management</b>, <b>Human Capital Management (HCM)</b>, and <b>Supply Chain Management (SCM)</b> applications to increase the speed in which businesses operate and to be more responsive along every touch point of their customer's journey. Founded in 2009, FinancialForce.com is backed by UNIT4 and Salesforce.com.</p>
<p><b>Kimble</b> (<a href="http://www.kimbleapps.com">www.kimbleapps.com</a>), based in <b>Phoenix (AZ)</b> and <b>London (UK)</b>, boosts business performance and agility through advanced PSA. The Kimble Application weaves CRM and PSA processes natively on the Salesforce platform delivering peerless resource planning and financial forecasting capabilities. More than 100 growing consultancies have gone live with Kimble in the last three years benefiting from a 1 to 5% improvement in EBIT. Salesforce recognized Kimble with its ISV Innovation Award in 2014.</p>
<p><b>NetSuite OpenAir</b> (<a href="http://www.netsuite.com/openair">www.netsuite.com/openair</a>) founded in <b>San Mateo, California</b> in 1999 is one of the world's leading providers of cloud-based business management software. In 2008/9 NetSuite acquired both OpenAir and QuickArrow, making it the largest independent PSA solution provider. NetSuite also offers native PSA as part of its Service Resource Planning (SRP): a complete bid-to-bill solution for project- and services-based organizations. It encompasses modules for project, resource, client and expense management, project accounting, time capture and billing along with a rich set of standard reports. NetSuite's powerful general ledger and multi-entity, multi-lingual, multi-currency revenue accounting supports the complex needs of global businesses.</p>
<p><b>Planview</b> (<a href="http://www.planview.com/">www.planview.com/</a>) headquartered in <b>Austin, Texas</b> provides Planview Enterprise for <a href="#">Services Resource Planning</a>. This next-generation professional services automation (PSA) approach offers seamless integration with CRM and ERP systems; empowering organizations to align resources with the demand for services; assess and manage demand across a broad array of projects while easily delivering reliable revenue forecasts every quarter.</p>
<p><b>Projector PSA</b> (<a href="http://www.projectorPSA.com">www.projectorPSA.com</a>) headquartered in <b>Boston, Massachusetts</b> is a best-of-breed Professional Services Automation tool designed with a focus on improving profit margins, resource utilization rates, and organizational visibility. Projector provides services firms with visually rich dashboards, comprehensive time and expense tracking tools, detailed project management functionality, real-time resource scheduling capabilities, collaborative project workspaces, and customizable invoicing features. Projector is a cloud-based, multi-currency, multi-company, PSA solution that is able to scale with the needs of an organization. It integrates with existing business systems through a portfolio of pre-built connectors and an open web services API. Projector PSA was founded in 2003 by a team of professional services executives and is solely focused on delivering a software solution exclusively targeted at the professional services market.</p>
<p><b>Tenrox</b> (<a href="http://www.tenrox.com">www.tenrox.com</a>) headquartered in <b>Austin, TX</b> is a workflow-driven, cloud application that is designed to meet the challenges of managing globally dispersed services organizations and project workforces. It automates project initiation, resource management, time and expense, and reporting and analytics to enable customers to improve the management of billable projects from pipeline to close. Tenrox offers configurable cost and billing rules, including chargeback or invoicing, with certified integrations to all major CRM and accounting systems. Organizations worldwide trust the Tenrox product to meet their requirements in the areas of Professional Services Automation (PSA) and time and expense tracking. Tenrox is part of the Upland Software family of cloud-based enterprise work management applications.</p>
<p><b>Unanet</b> (<a href="http://www.unanet.com">www.unanet.com</a>) headquartered in <b>Dulles, Virginia</b> delivers Unanet Project Portfolio, a complete Professional Services Automation (PSA) solution with resource requesting and management, skills, opportunity and project management, project accounting, invoicing and revenue recognition, timesheet management, expense management and teamwork collaboration capabilities in one business management software solution. This integrated set of capabilities delivers real-time performance management of projects and people. Visual insight into resource demands, commitments and capacity ensures managers have the information needed to make optimum decisions about their project portfolio. Unanet is available both in the cloud and on premise.</p>

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## What to look for in a PSA

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So what should you look for in a PSA provider? Here are some of the important considerations when evaluating PSA solutions:

- △ First and foremost, a good PSA solution will accurately model your business in the way that you think about it, rather than forcing you to change your business to fit the system.
- △ A good PSA provider should be a proven expert in integration, because PSA has to work with existing on-premise and cloud- based information systems.
- △ Powerful and flexible reports and dashboards to provide a variety of reports for better decision-making and analysis. Also, it should be easy to change and build your own reports.
- △ A PSA solution that uses technologies and tools you are familiar with to reduce training time and costs and ensure that you have access to the expertise that is required to roll out and fully leverage the PSA solution and its reporting capabilities.
- △ Automated and easy-to-use time and expense capture that supports mobile and offline access. Integration between time and expense capture and billing to produce timely and accurate invoices.
- △ For global organizations, support for multiple currencies and languages conforming to local revenue accounting and taxation rules.
- △ Ability to support complex billing rules for time and materials, work-in-process, milestone and fixed-price work that conform to your revenue recognition policies.
- △ Cloud-based PSA reduces the cost of implementing and maintaining the application. Reduces the reliance on overburdened in-house IT staff.
- △ Cloud-based PSA providers constantly improve the application so it tends to be more responsive and does not require expensive upgrades.
- △ Vendor partnerships like Salesforce.com's AppExchange and Microsoft Dynamics certification ensure the PSA application will easily support integration to market-leading CRM and financial applications.

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## PSA differentiators

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There are a variety of considerations in selecting a PSA solution. These range from technology infrastructure, to organization size, location and support for specific functionality. Just like no two service or project- and services-based organizations are alike, nor are PSA solutions. Table 6 highlights some of the most important aspects to consider. Each organization places a different emphasis on these criteria, so it is important the vendor you choose builds solutions to match your priorities.

**Table 6: PSA Solution Differentiators**

No.	Differentiator	Description
1	Heritage	Origin of PSA solution – vertical market focus, size of organization, languages, currencies, etc.
2	Solution Depth and Breadth	There are scores of modules and applications for project- and services-based organizations. Several ISVs offer all, while some offer a subset. Some ISVs offer in-depth functionality in one or several modules, while some offer minimal functionality.
3	Integration	Despite the number of modules, ease of integration is an important consideration both to other enterprise applications and devices. What integration tools does the vendor provide? Whose responsibility is it to develop, implement, manage and maintain integration?
4	Organization Spectrum	Some ISVs focus primarily on billable service organizations, while others sell to internal service departments that support both internal operations and external customers. Many of the fastest growing cloud providers specialize in supporting embedded PSOs within technology companies with support for complex revenue recognition rules. The ability to capture time and support multiple billing models including time and materials, fixed price and work-in-process with support for leading accounting standards, are also key decision considerations.
5	Vertical Market	Some ISVs sell to a variety of vertical markets, some are more focused on particular verticals such as AEC (architects, engineering and construction) or government contracting each with complex project accounting rules.
6	Customer Size	The largest PSA suppliers focus on the largest, most complex enterprise organizations by targeting features needed by global enterprises. Newer, cloud-based suppliers focus primarily on the small to mid-market. The critical consideration is cost, complexity, depth of solution and total cost of ownership.
7	Delivery	Most enterprise suppliers have moved to port their PSA solutions to the cloud – they now offer on-premise, hybrid (managed service), private cloud and multi-tenant cloud-based applications. A key consideration with legacy PSA providers is their support for a true multi-tenant cloud solution that offers economies of scale and typically lower costs of ownership and support.
8	Platform	The choice of database and development tools and platform is an important one although most of the major suppliers do offer standard integration tools. The two primary database platforms are Microsoft SQL Server and Oracle. SAP now offers its own high-performance database, HANA. Choice of database and development platform is important as Salesforce.com also offers its own development tools and platform. Database and development platform interoperability and integration tools are all important considerations.
9	Geography	Many North American-based ISVs have significantly increased operations overseas. What is most important is that the ISV provides local support wherever their solutions are sold.
10	Language / Currency	Many organizations manage operations in multiple countries. Multi-currency, multi-language and support for country-specific accounting rules and taxes are important considerations for global organizations. Support for Asian double-byte characters may not be offered by domestic suppliers. Service organizations operating globally must carefully confirm language and currency support for the countries in which they do business.
11	Vendor Viability	New vendors come to market regularly, so it is critical to analyze their long-term viability. If they appear to be acquisition targets or were just recently acquired, be wary, as solution development may have an uncertain future. Carefully review the vendor's track record, long-term support, growth, level of solution investment and customer references.
12	Cost	Cost is an important factor when considering the purchase of PSA. SPI Research typically sees the total deployment cost of the solution (hardware, software, services) ranging between \$500 and \$1,500 per seat. It is also important to consider annual maintenance and upgrade costs. Support costs average between 18% and 25% of the initial license price. One key, but often forgotten cost consideration is the cost to make changes to the system after the initial deployment. Different architectures can make the on-going cost of system enhancements and changes many multiples of the cost of the initial deployment.

No.	Differentiator	Description
13	Service and Support	A good product must be paired with an ability to provide excellent service and support for the product. A key consideration is whether the vendor has particular expertise in the professional services industry, or whether professional services is just one of a multitude of markets it serves. Equally important is how knowledgeable, accessible, and efficient the vendor's support capabilities are. Does the support team truly understand the product and the business needs of a PSO, or is it an outsourced or off-shore group with only a peripheral understanding?
14	User Satisfaction	Perhaps one of the best ways to gauge how well a particular PSA solution addresses the needs of its target audience is to measure referenceability of its clients and satisfaction of its users. The <a href="#">2014 Professional Service Maturity™ Benchmark</a> , shows market penetration and vendor user satisfaction ratings.

## 6. SELECTION PROCESS

Professional Service Automation solutions are no longer a “nice to have”. They have become mission-critical applications for PS providers who are serious about improving resource and project management while effectively capturing and billing time and expense. Interviews with leading firms that have implemented PSA provide these recommendations for selection and implementation:

- △ Build a business case for PSA with specific deliverables and expected outcomes;
- △ Make sure there is a PSA executive champion who can work to assure the solution is used to its fullest potential;
- △ Have a team responsible for benchmarking and improving organizational capabilities. The data coming out of PSA is useless unless executives act on it;
- △ The PSA provider you choose should share your enterprise software strategy and vision. For example, if you have Salesforce.com as your CRM and Microsoft Dynamics as your financial tool; how does this vendor work with and connect to your existing systems and investments?
- △ Select a solution with core vertical expertise and consider a cloud-based solution if the PSO does not have the infrastructure or personnel to support on premise; and
- △ Thoroughly examine and streamline business processes prior to or in conjunction with PSA deployment.

All key stakeholders must be “kept in the loop” as to the progress of PSA selection, implementation and rollout. In the end, PSA is an enabler; it is the PS management team that must enable it. With executive commitment and the right solution the organization will become more competitive, productive and profitable — achieving excellence along the way.

Once you have decided your organization will move to a PSA solution it is time to develop a selection process. While cost is one of the most important considerations, there are many other factors that should be part of the selection process. Figure 8 and Table 7 outline a six-step selection process.

# 2014 PSA Buyer's Guide

Figure 8: PSA Selection Process

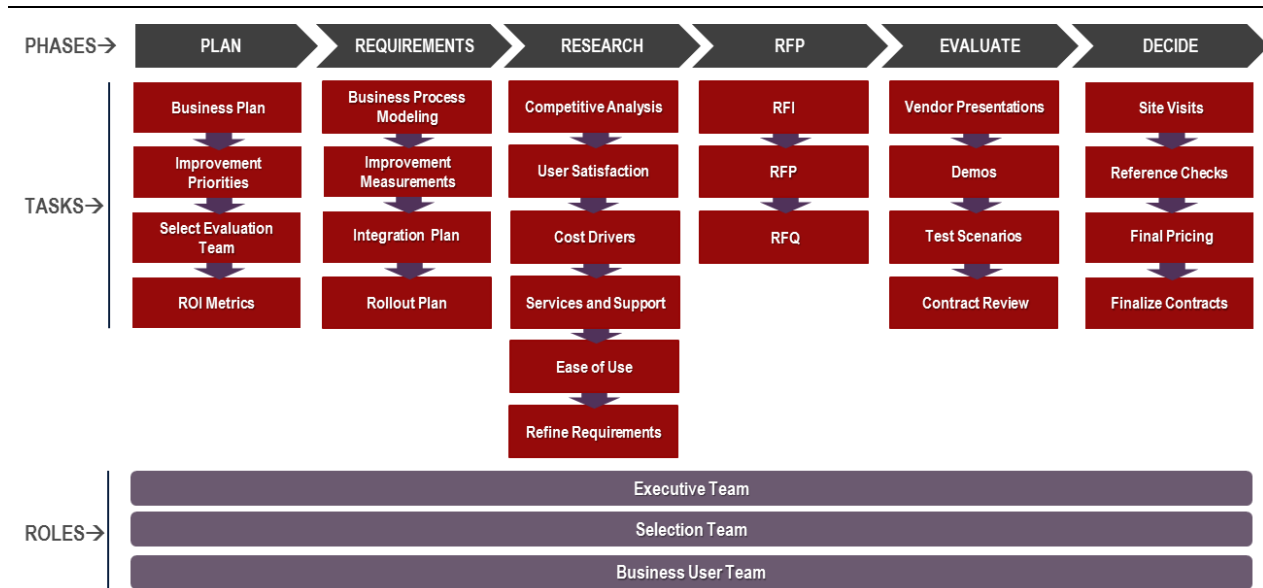


Table 7: Selection Process

Step	Description	Who is involved
1.	<b>Business Plan:</b> Identify growth opportunities and key improvement initiatives. Assign initiative owners. Identify “organizational must haves” and success criteria. Determine PSA selection team, timelines and budget. Which executives will oversee selection and deployment? What specific benefits are planned, and how will they be measured?	Executive Team
2.	<b>Requirements:</b> Develop requirements including core business processes to be automated. How will business process and behavioral change be managed? Develop current state metrics and improvement targets. Develop improvement priorities and measurements. Identify operating unit subject matter experts (SMEs) who must be involved or consulted. Determine budget and ROI metrics to justify purchase. Identify priority application integration points and data to be migrated. How will the system be rolled out (entire company, by department, other)? Which features will be deployed immediately and which can be phased in over time? How will groups transition to the new system, who needs to be involved and trained? Establish selection process, decision criteria and timelines.	Core selection team including IT, business owners, finance and operations
3.	<b>Research:</b> Analyze research reports, industry blogs, competitive analysis, installed base, user satisfaction ratings, vendor websites, and cost of ownership information. Review demos, webinars, case studies, product guides and specifications to determine “must haves” versus “nice to haves”. Identify deployment options including preference for cloud, hosted or on-premise solutions. How are solutions maintained and upgraded? What is the process for new releases? Support for business processes – process modeling tools, workflow, alerts and approvals. Ease of use – user interface, standard reporting and support for custom reports and analysis. Determine and prioritize decision criteria and evaluation methods.	Core selection team
4.	<b>Develop RFI, RFP or RFQ:</b> Determine whether you will use outside consultants to help with the selection process. Determine if you will develop a multi-step or single step requisition process. In a Request for information (RFI) a broad list of vendors are asked to provide general information, background and strengths. A Request for Proposal (RFP) includes detailed required functionality, decision criteria and weighting. Determine which vendors will be involved in the selection. Establish timelines. A Request for Quote (RFQ) is the final step in the process including detailed pricing and proposed contract terms and language.	Core selection team

Step	Description	Who is involved
5.	<p><b>Evaluate:</b> Depending on your requisition process you may have already whittled down the list of potential vendors from dozens to a short list. Detailed evaluation should be limited to 5 or fewer vendors as it is time-consuming, exhausting and can be confusing. Evaluations should include in-person meetings with each vendor team to discuss requirements and how the vendor will handle them. The next meetings will be for the vendors to propose their solutions. Presentations should include detailed, customized demos targeted at your specific needs and use cases, rather than generic presentations devoid of any understanding of your business.</p> <p>Discussions should include target user groups to evaluate functionality, ease of use, business process change and user acceptance. How does the solution handle core business processes? Or should business processes change to mirror the solution? How much customization will be required? What services will be required? How long will it take to convert and deploy? Does the vendor provide data migration tools and services?</p> <p>Key to the evaluation is the level of support the vendor will provide, who will implement the system, customization required, on-going support and upgrade schedule. Make sure to evaluate the implementation team as carefully as you do software functionality as a successful implementation will determine ultimate success or failure. Cost analysis must include implementation, data migration, integration, customization, training, purchase price and on-going maintenance.</p>	Core selection team, target user groups, implement team
6.	<p><b>Decide:</b> Site visits and reference checks with the preferred supplier. Review contracts and terms. Determine implementation process, timelines and teams. Performance guarantees. Negotiate pricing.</p>	Core team, legal team, finance

## Important considerations

Selecting a new PSA solution is only part of the journey. It is imperative your organization prepare for the change the new solution will bring. A fundamental decision is how will the solution be deployed? The following table highlights important aspects of cloud, hosted and on-premise solutions.

**Table 8: PSA Deployment Considerations**

	Multi-tenant Cloud	Hosted	On-premise
<b>Licensing Options</b>	Monthly, annual or multi-year subscription-based contract. Per user per module varies by application, tiered for SMB or enterprise.	Fees are assessed based on a Service Level Agreement (SLA), which factors in the initial cost, depreciation and operating costs of hardware, software & networks.	Term or Perpetual Options Upfront license payment for Database, PSA and modules. Pricing tiers based on size of organization.
<b>Support Options</b>	On-going support and upgrades are provided by vendor. Mandatory support is included in the subscription price.	Service Level Agreement with hosting provider. Typically includes application vendor-supplied software support the same as on-premise.	Typically 18% of first year license fees for basic software maintenance which includes bug fixes, telephone support and upgrades.
<b>Deployment</b>	Vendor hosts hardware and provides multi-tenant (one code base) software over the internet.	Applications are accessed over a network provisioned and maintained by the hosting provider.	Client owns and operates hardware, software and network. Requires dedicated IT staff.
<b>Implementation</b>	Typically 90 to 180 days. Vendor or partner supplied consulting support.	Same as on-premise	Project specific – minimum 90 days to multi-year supplied by vendor or implementation partners.
<b>Integration</b>	Vendor-specific or partner supplied integration tools are available. Client pays for integration modules, implementation and support.	Same as on-premise. May be provided on a project-basis by hosting provider.	Vendor specific or partner supplied integration tools. Client pays for integration modules, implementation and support.
<b>Customization</b>	Vendor-specific development tools & customization options. Customization typically limited to UI, integration & reports.	Same as on-premise.	Unlimited – client responsible for customization, upgrades, migration & on-going support.

	Multi-tenant Cloud	Hosted	On-premise
<b>Upgrades</b>	Typically semi-annually or quarterly. Clients are upgraded at the same time, all run on the same version.	Same as on-premise.	Typically annual or semi-annual. Upgrades & migration are optional, scheduled at client's convenience.

## 7. CONCLUSIONS AND RECOMMENDATIONS

Competing in the 21<sup>st</sup> century brings new challenges for professional services organizations. PS employees are working more hours, with tighter budgets, and firms are dealing with greater uncertainty than ever before. The global economy is rapidly changing with countless people and organizations being left behind because they are not up-to-speed with technology innovation. While many PSOs are meeting these challenges through mergers, acquisitions and virtual partnerships, the bottom line is that they need to improve in the areas of innovation, speed, efficiency, and quality — in order to survive.

These organizations must have the tools to prepare them for the uncertainties that lie ahead, as well as make them more productive. The professional services industry has begun the change from an era where problems could be solved with specialized, nonintegrated applications to one where integration — and the visibility it provides — are paramount to success. This integration is necessary for executives to make transformational decisions and improve their ability to effectively compete and win.

The decision to implement a new Professional Service Automation solution is one of the biggest decisions your organization will make. A modern PSA solution should improve usability, conform to best practices in business operations, and ensure compliance with regulations and taxes. The fact is most organizations adopting PSA have seen dramatic improvements in efficiency, collaboration and quality.

Replacing multiple legacy systems and a mountain of error-prone spreadsheets frees up management, finance and operations to focus on running the business, not reacting to the business. Accurate and timely information is not only critical for regulatory reporting but also for operational performance improvement. Real-time visibility can mean the difference between low and high profitability for project- and services-based organizations. The ability to anticipate and respond to changing conditions can both make and save a lot of money.

## 8. KIMBLE PSA

# KIMBLE

**Fuel your Professional Services business growth with the ultimate PSA**



### WHY SWITCH TO KIMBLE?

Kimble will **revolutionize your business** and provide the engine for future business growth by:

- Increasing resource utilization through the visibility of forecast resource needs
- Increasing revenue completeness
- Reducing overhead costs through process automation
- Protecting margin throughout the project lifecycle
- Increasing employee and customer satisfaction
- Reducing aged debt through invoicing accuracy
- Reducing days to close each month (can do in 3 days)



**Kimble is the only specialist Professional Services Automation vendor on the Salesforce platform. The Kimble application weaves CRM and PSA processes together providing superior resource planning, management information and financial forecasting**

Kimble automates professional services processes and makes your business more manageable delivering efficiency, scalability and visibility - an engine for business growth.

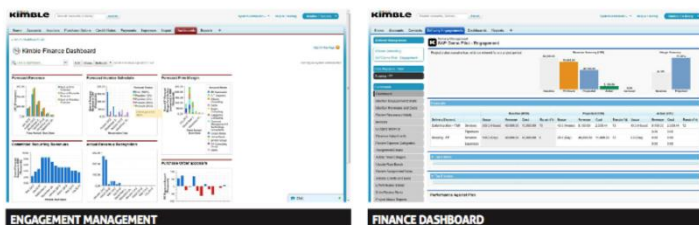
Kimble enables the holistic management of your entire business, rather than the traditional narrow focus on Operations, Sales or Delivery solutions. In a single product, Kimble provides the combined functionality of separate Opportunity management, PSA, T&E and Financial reporting systems, dramatically reducing process complexity and boosting business. Kimble is the only genuinely integrated solution providing support for all the key business processes.

With superior insight in terms of real-

time diagnostics and KPI reporting, which gives instant visibility into the health of your business and allows you to better plan and control your future. From sales, through delivery, to billing, Kimble will measure and accurately report your current and projected performance and facilitate the appropriate adjustments in resourcing.

Deliberately designed to be configured, with no hidden customization costs, Kimble enables rapid implementation.

Built on the market leading cloud platform, Force.com, Kimble is a cloud-based solution, providing easy access across multiple devices, which will future proof your business against more traditional solutions.



Kimble customers typically grow 25% faster than industry average by providing real-time information that allow business leaders to understand and remedy any underlying issues in their business. This holistic focus on business improvement, as opposed to just operational support, is unique in the market, and is essential for Professional Services organizations to improve the quality of their business and realize their objectives.

[www.kimbleapps.com](http://www.kimbleapps.com) [info@kimbleapps.com](mailto:info@kimbleapps.com) US: +1 (480) 240 7384 UK: +44 (0) 207 401 8900

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**KIMBLE**

Fuel your Professional Services business growth with the ultimate PSA

## KEY FEATURES

### Opportunity management

- Account, contact & opportunity management (Sales Cloud)
- Detailed services forecasting
- Predictive revenue recognition

### Resourcing

- Vacation & training planning
- Capability/ skills management
- Real time demand/ supply link

### Delivery

- Detailed resource forecasting & effort planning
- Purchase order management
- Expense & overtime policies
- Issue & risk management
- Project Gantt Chart

### Time and Expense

- Predictive timesheets
- Approval processes
- Mobile access (with offline)

### Billing

- Automatic invoice generation
- Finance integration
- Payment management

### Management Information

- Comprehensive dashboards
- 80+ reports & dashboards

Do you know instantly why a KPI is above or below target?

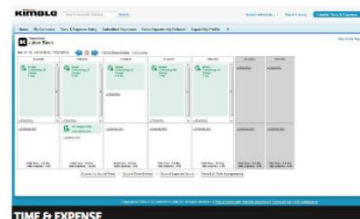
Are your workforce truly collaborating?

Do your business systems integrate seamlessly?

Access a world where your business system helps you collaborate across the organisation, continuously improve and win more business



RESOURCING



TIME & EXPENSE

Kimble dramatically reduces process complexity and boosts efficiency by integrating the sales, operations and delivery elements of Professional Services firms.

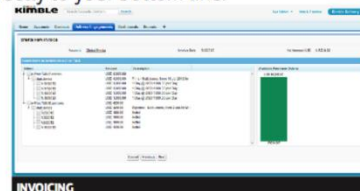
Real-time diagnostics and empirical KPI reporting give complete and instant visibility into the health of your business. Providing a comprehensive view of current, historic and future performance.

Kimble is the only management solution designed specifically for Professional Services by experts from within the industry.

Kimble PSA is the engine for future business growth delivering rapid results which fuel productivity and contribute directly to your bottom line.



OPERATIONS



INVOICING

## SWITCHING TO KIMBLE

Kimble can be easily implemented in your company whatever the size and wherever you are situated.

The service is delivered through the highly scalable and secure Salesforce.com infrastructure on the Force.com platform, and is entirely based on the web with no software to install. The Force.com infrastructure is hosted in highly secure mirrored data centres, which you have full access to over the Internet.

Kimble work with you to understand your current processes and data take-on requirements. We then train your key users in Kimble configuration and how to use the system functionality in line with your organizations processes.

Finally, we work with your key users to configure the system specifically for your organization, and assist in migrating existing data into Kimble to facilitate your organizations seamless transition.

**"Kimble is absolutely essential to our business growth. It gives us the right information in the right place at the right time"**

Paul Driver, Founder PCubed

**"Kimble has allowed us to radically stream-line our processes and given us a more effective business"**

Neil Coughlan, MD  
Oxford Computing Group

## OUR GUIDING PRINCIPLES

Provide a single go-to system for Professional Services companies

Ensure the system is embedded within best practice business process

Have a well-defined product roadmap

Provide real management insight

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## About Service Performance Insight

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**R. David Hofferberth, PE**, Service Performance Insight founder, managing director and licensed professional engineer has served as an industry analyst, market consultant and product director. He is focused on the services economy, especially productivity and technologies that help organizations perform at their highest capacity.

Dave's background includes application and analytical tool development to support business decision-making processes. He has more than 30 years of domestic and international experience with firms including the Aberdeen Group and Oracle. Contact Hofferberth at [david.hofferberth@spiresearch.com](mailto:david.hofferberth@spiresearch.com) or 513-759-5443.



**Jeanne Urich**, Service Performance Insight managing director, is a management consultant specializing in improvement and transformation for project- and service-oriented organizations. She has been a corporate officer and leader of the worldwide service organizations of Vignette, Blue Martini and Clarify, responsible for leading the growth of their professional services, education, account management and alliances organizations.

Jeanne is a world-renowned thought-leader, speaker and author on all aspects of Professional Services. Contact Urich at [jeanne.urich@spiresearch.com](mailto:jeanne.urich@spiresearch.com) or 650-342-4690.

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Service Performance Insight (SPI Research) is a global research, consulting and training organization dedicated to helping professional service organizations (PSOs) make quantum improvements in productivity and profit. In 2007, SPI developed the PS Maturity Model™ as a strategic planning and management framework. It is now the industry-leading performance improvement tool used by over 10,000 service and project-oriented organizations to chart their course to service excellence.

SPI provides a unique depth of operating experience combined with unsurpassed analytic capability. We not only diagnose areas for improvement but also provide the business value of change. We then work collaboratively with our clients to create new management processes to transform and ignite performance. Visit [www.SPiresearch.com](http://www.SPiresearch.com) for more information on Service Performance Insight, LLC.