

**June 2, 2016**

## **Webinar Presentation**

**PSA Crystal Ball: 3 Ways to Predict Your  
Service Organization's Success**



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# Today's Presenters:



John Ragsdale  
*VP Research, Technology and Social*  
TSIA



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*Sr. Solution Consultant*  
Tenrox by Upland



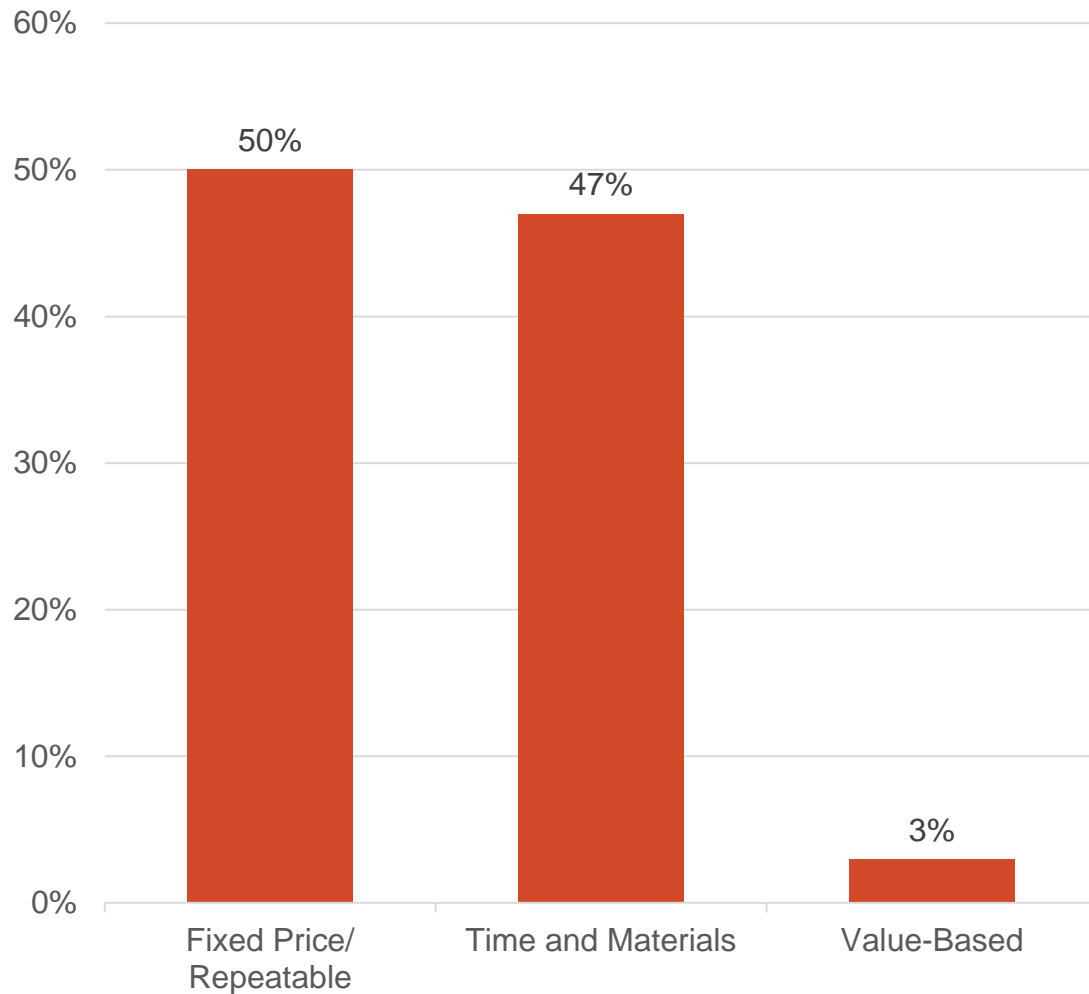
# PSA Crystal Ball: 3 Ways to Predict Your Service Organization's Success

John Ragsdale

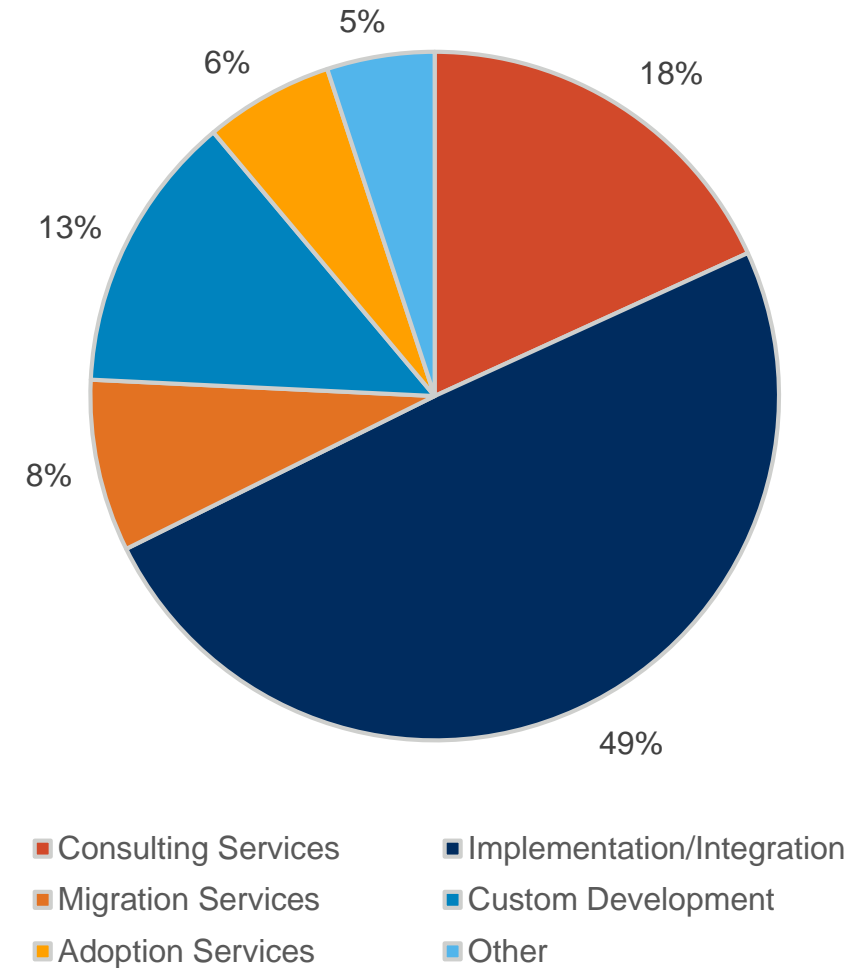
VP Research, Technology and Social  
TSIA

# Professional Services Projects in Transition

## PS Projects by Type

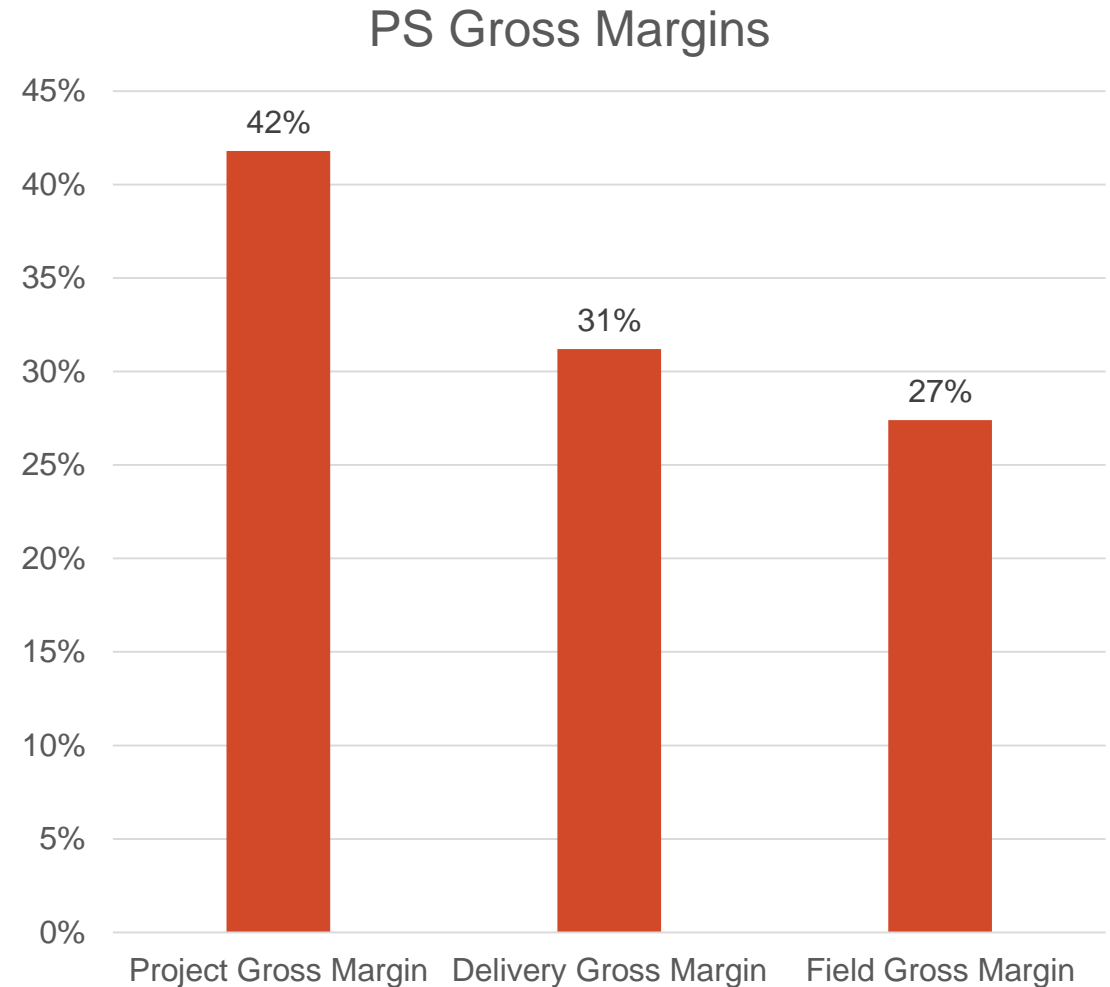


## PS Revenue Source



# Extreme Automation Required

- Repeatable projects represent 50% of all projects, yet only deliver 38% of PS revenue
- Improving utilization rates and margins for repeatable projects requires additional automation:
  - Predefined process and project maps
  - Real-time project dashboards
  - Knowledge management and collaboration
  - Pricing analysis



Source: TSIA PS Benchmark

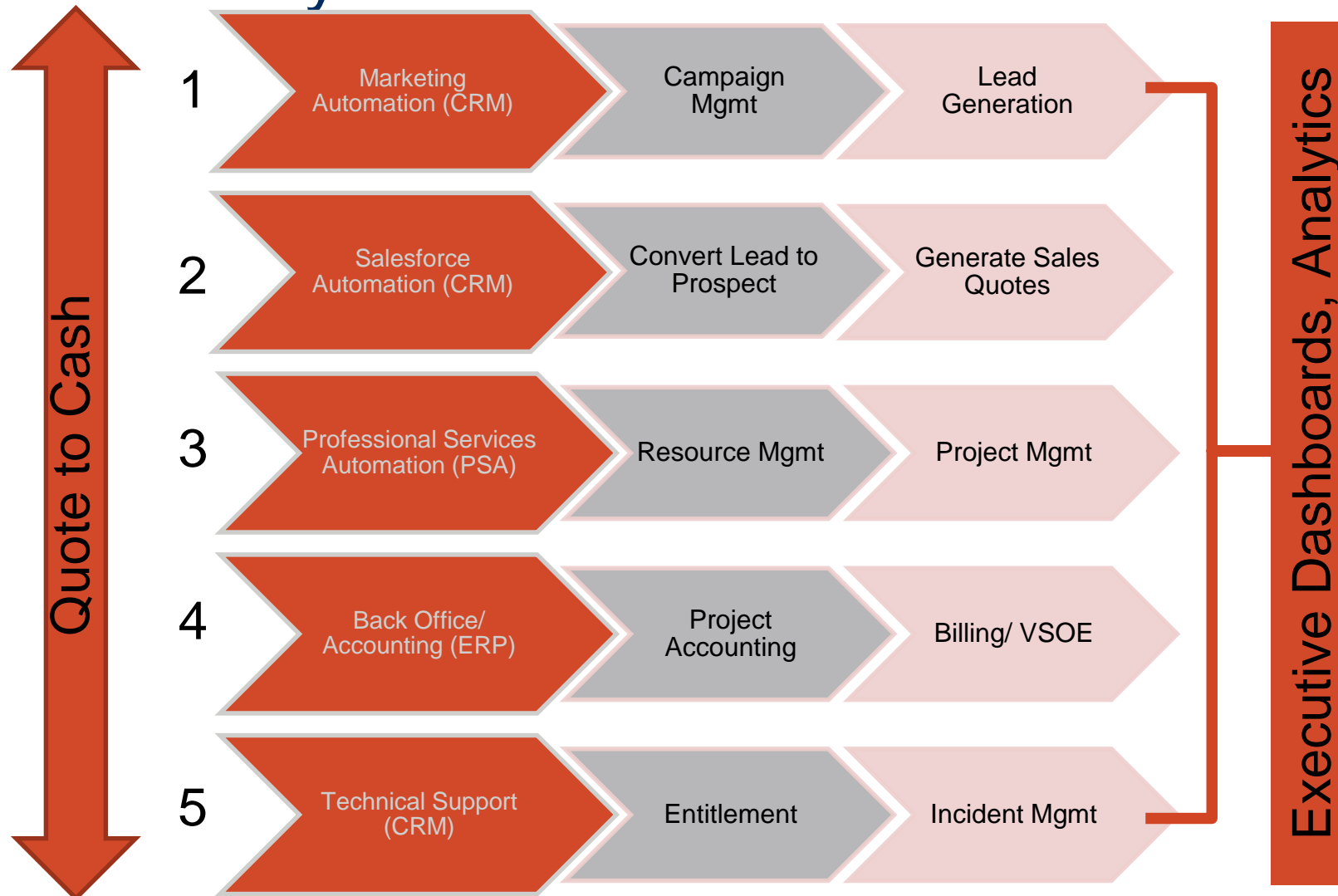
# PSA Crystal Ball: 3 Ways to Predict Your Service Organization's Success

- How analyzing historical data helps optimize future service delivery
- The value of streamlining sales activities with resource planning
- The role “Proactivity” plays in predictive project management



# Analyzing Historical Data to Optimize Future Service

## Delivery



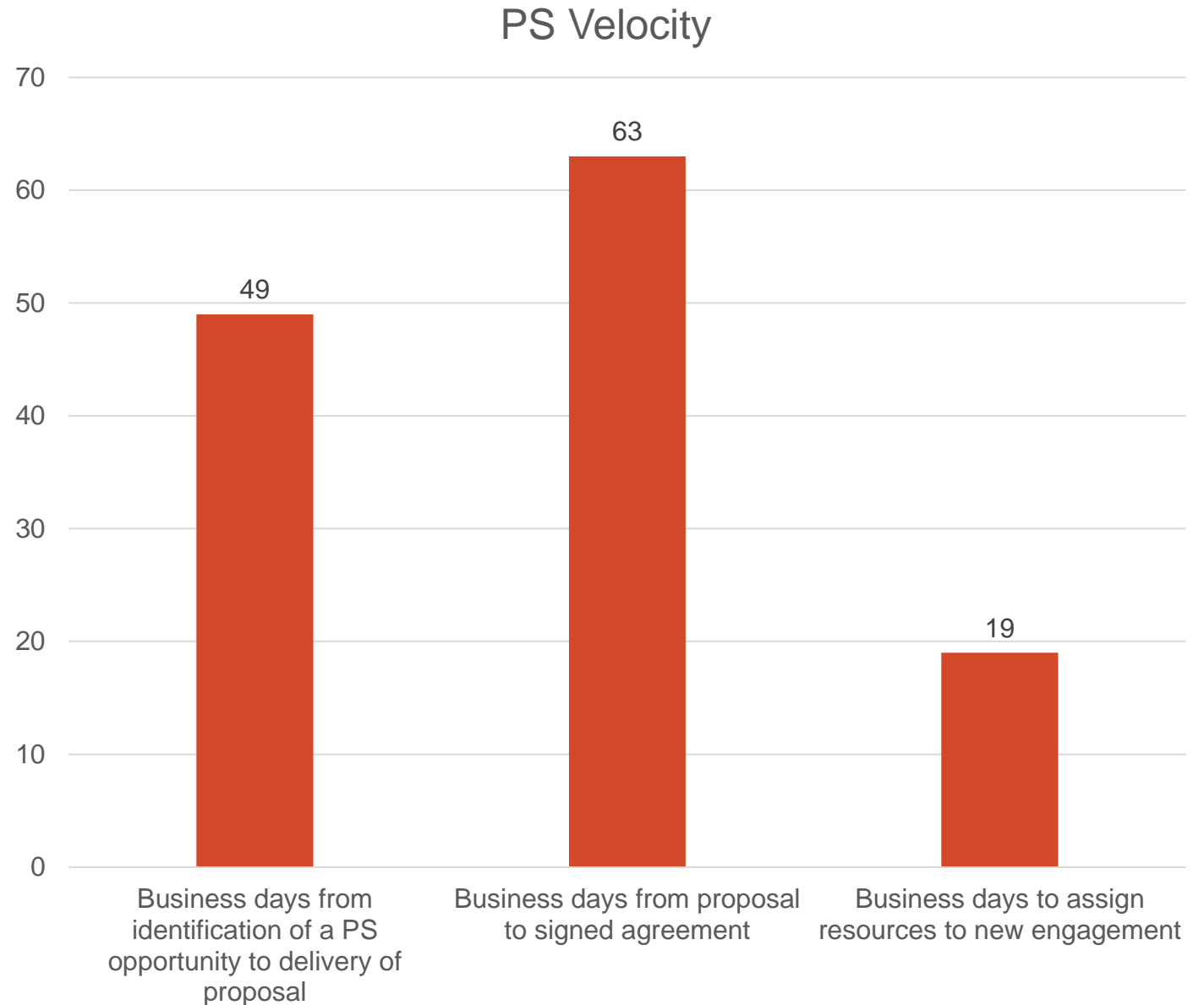
END TO END BUSINESS PROCESS, ENCOMPASSING CRM, PSA AND ERP

- CRM integration
  - Win:Loss analysis
  - What project profiles are being pitched?
  - Training for sales on most profitable/successful projects
  - Future resource needs: What project profiles are trending?
- ERP integration
  - Correlating DSO with project success

# Streamlining Sales Activities With Resource Planning

Lack of automation and complex manual processes are extending time to create, sell and source new engagements.

With a shift toward value realization and Customer Success, PS velocity must improve.



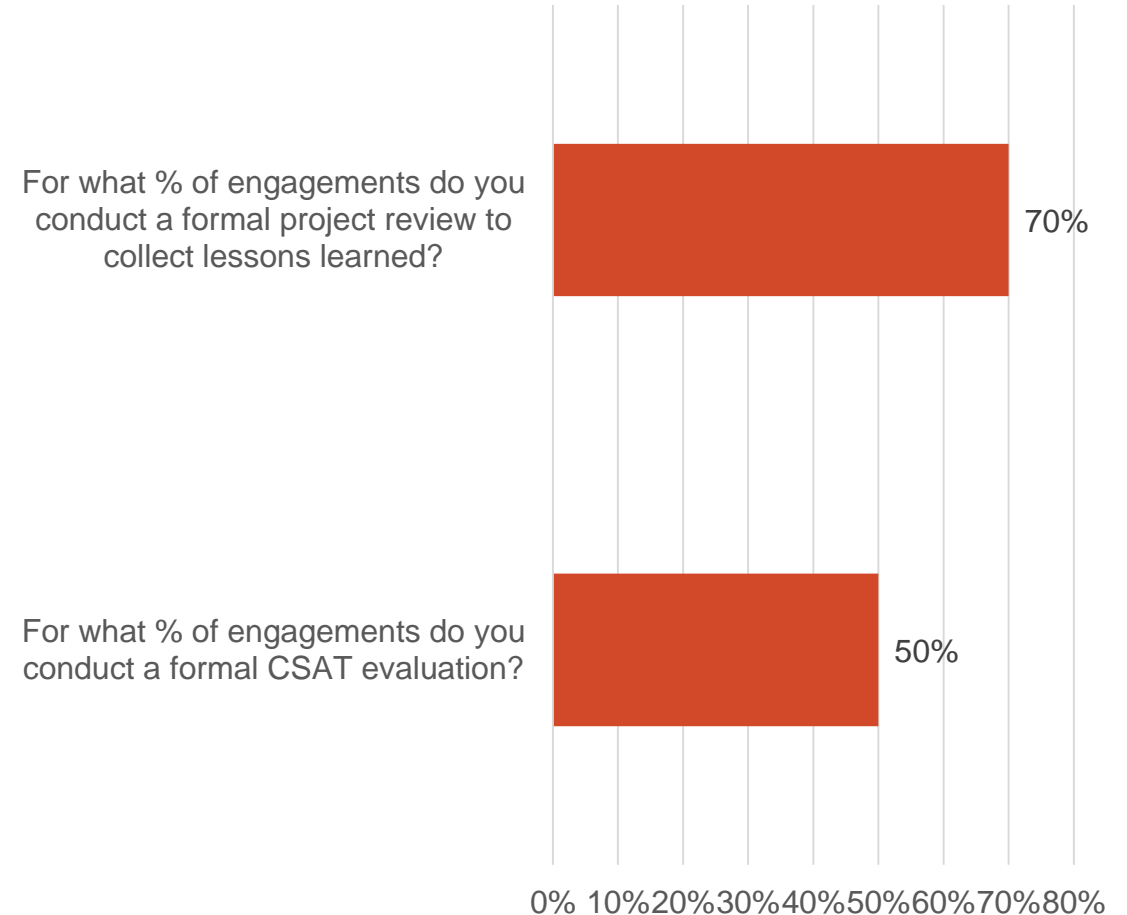
Source: TSIA PS Benchmark



# Proactive Project Management

- When the project has ended, it is too late to fix problems
- Real-time project dashboards are needed to understand:
  - Projects missing milestones
  - Projects with poor margins
  - Projects with poor CSAT
- Proactive notification or color coding to alert managers of potential issues
- Early detection of problems mean projects can be corrected before negative impacts occur

## Assessing Project Success



Source: TSIA PS Benchmark



# PSA Crystal Ball: 3 Ways to Predict Your Service Organization's Success

Neil Stolovitsky  
Sr. Solution Consultant  
Tenrox by Upland

# UPLAND PRODUCT FAMILY



## PROJECT & IT MANAGEMENT

*Manage your organization's projects, professional workforce and IT costs.*



## WORKFLOW AUTOMATION

*Real time productivity optimization, collaboration, and functional automation across your organization's value chain.*



## DIGITAL ENGAGEMENT

*Effectively engage with your customers, prospects and community via the web and mobile technologies.*



### KEY DIFFERENTIATORS

- + 20 Years of Enterprise Market Leadership
- + Visual Workflow-driven Architecture
- + Unique Timesheet Template Designer
- + Modular Approach for Quicker Deployments

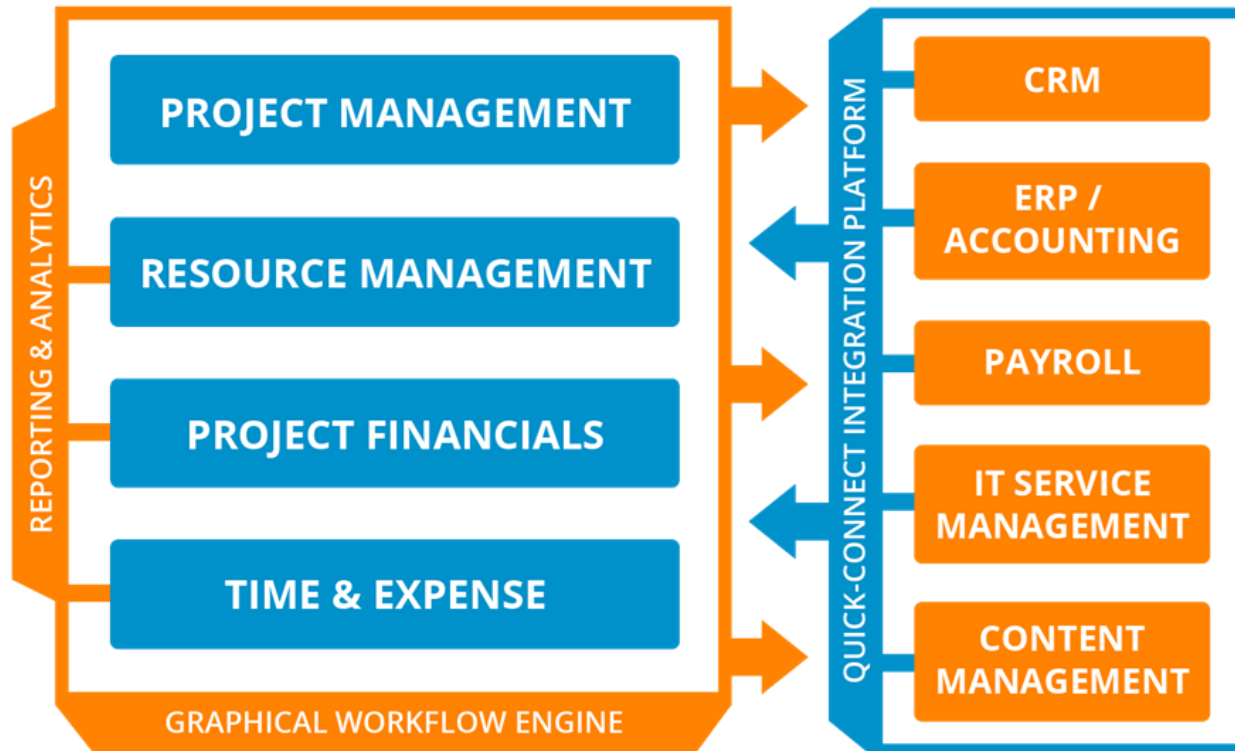
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### THOUGHT LEADERSHIP

- + Market Innovator
- + Best practices
- + Pitfalls to avoid
- + Keeping it simple

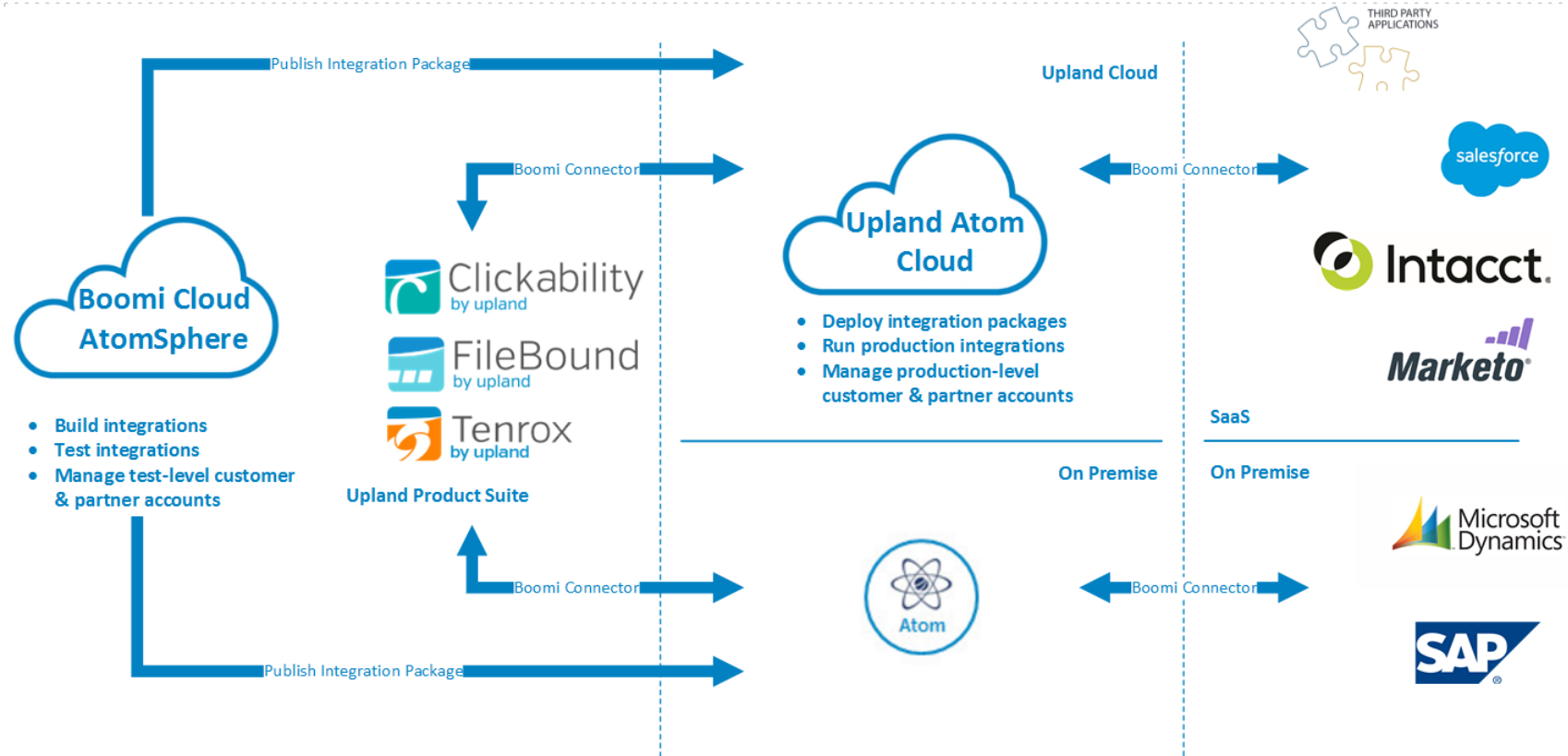


# INCREASED VISIBILITY ACROSS THE ORGANIZATION



- + Feed your PSA with strategic data from your existing systems
- + End-to-end visibility will allow for true forecasting
- + Leverage multiple data sets and make proactive decisions
- + Open PSA platform will provide flexibility to adapt to changing market conditions
- + Move from being tactical to being strategic

# CLOUD PSA - EXTENDING THE STRATEGIC VISION WITH IPAAS



+ A strong PSA strategy and solution will provide the latest methods to deliver quicker access and more possibilities to mine an organization's business data.

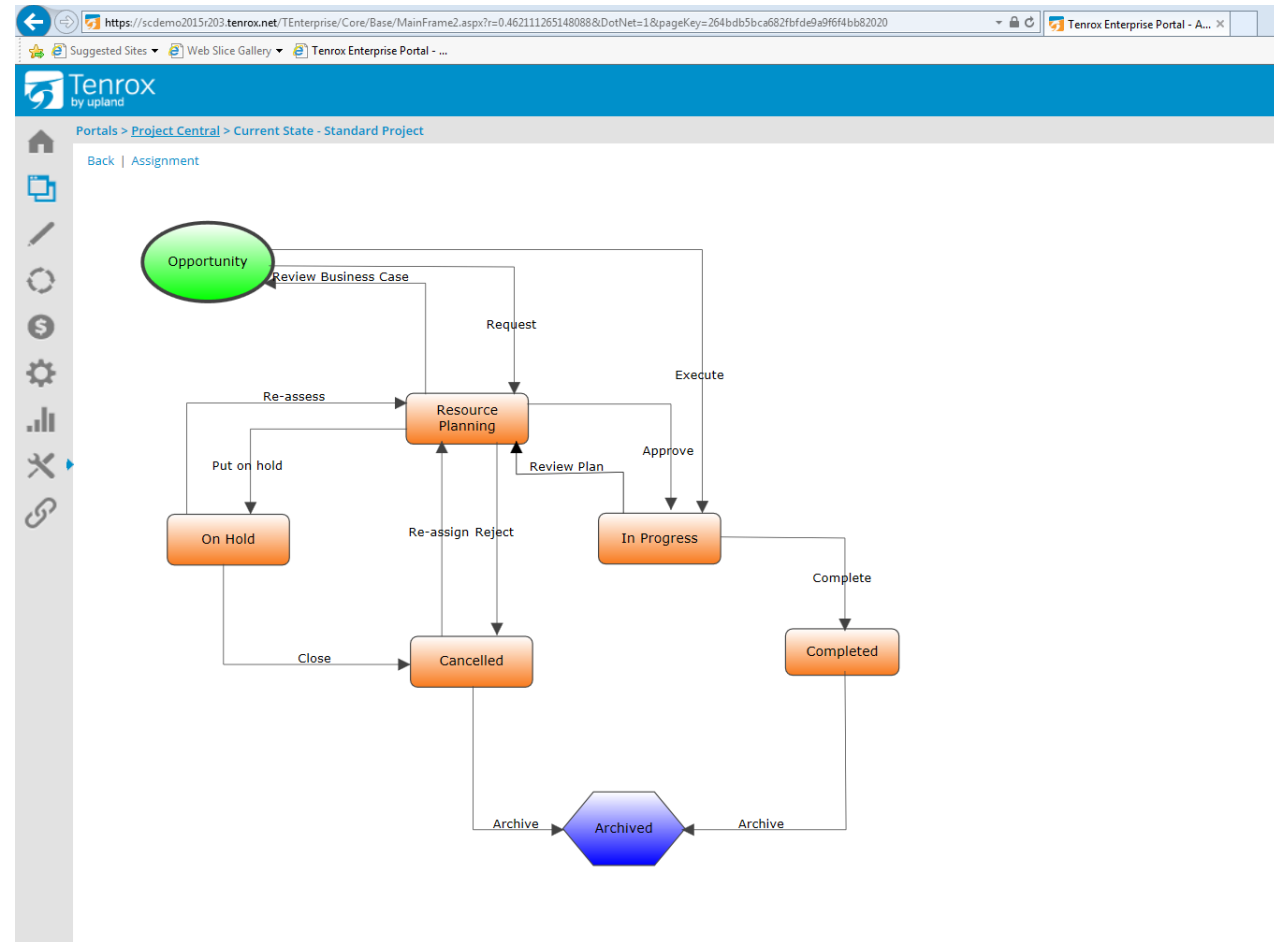
# CENTRALIZE PROJECTS IN A SINGLE SYSTEM

The screenshot displays the Tenrox Enterprise Portal interface. At the top, the browser address bar shows the URL: <https://scdemo2015203.tenrox.net/Enterprise/Core/Base/MainFrame2.aspx?r=0.462111265148088&DotNet=1&pageKey=264bdb5bca682fbfd9a96f4bb82020>. The page header includes the Tenrox logo and the user profile for Mark Ashton, Director of Services + Admin. The main navigation bar shows 'Portals > Project Central' and a dropdown menu with options: 'My Projects', 'Available Projects', 'Software Projects', 'Templates', and 'Opportunities'. Below the navigation, there are links for 'Refresh', 'New', 'Delete', 'Import Budget', 'Invoice Batch Manager', and 'Invoice Manager'. A search bar is present with the text 'Search by: Project' and a search icon. The central part of the page features a table with the following data:

	Project	Client	State	Soft Booked Hours	Priority	Start	End	Project Manager	Project Type	Action
<input type="checkbox"/>	ERP Upgrade	Internal	Opportunity	420.00 hr(s) 1	Low	01/01/2016	Open Ended		Hardware	--- Please select ---
<input type="checkbox"/>	Mobile Application	Verizon Communications	Opportunity	795.00 hr(s) 3	High	02/02/2012	Open Ended		Hardware	--- Please select ---
<input type="checkbox"/>	Mobile Gizmo	Adobe System	Opportunity	150.00 hr(s) 3	High	02/03/2012	Open Ended	Jones,Andrew	Hardware	--- Please select ---
<input type="checkbox"/>	Platform Deployment	Bank Of America	Opportunity	969.00 hr(s) 4	Important	01/01/2016	Open Ended	Ashton,Mark	Hardware	--- Please select ---
<input type="checkbox"/>	Resource Management	Ford Motor Company	Opportunity	122.00 hr(s) 1	Low	11/08/2012	Open Ended	Ashton,Mark	Software	--- Please select ---
<input type="checkbox"/>	Sharepoint Portal	Internal	Opportunity	306.00 hr(s) 1	Low	11/08/2012	Open Ended		Mixed	--- Please select ---
<input type="checkbox"/>	Technical Support	Internal	Opportunity	996.00 hr(s) 3	High	02/01/2012	Open Ended		Hardware	--- Please select ---
<input type="checkbox"/>	Upgrade Phone App	JP Morgan	Opportunity	93.50 hr(s) 1	Low	01/01/2016	07/31/2016	Ashton,Mark	Mixed	--- Please select ---
<input type="checkbox"/>	WP8 Upgrade	Internal	Opportunity	956.80 hr(s) 1	Low	02/25/2013	Open Ended		Mixed	--- Please select ---

At the bottom of the page, there is a pagination control showing 'Page 1 of 1 (9 Item(s))'.

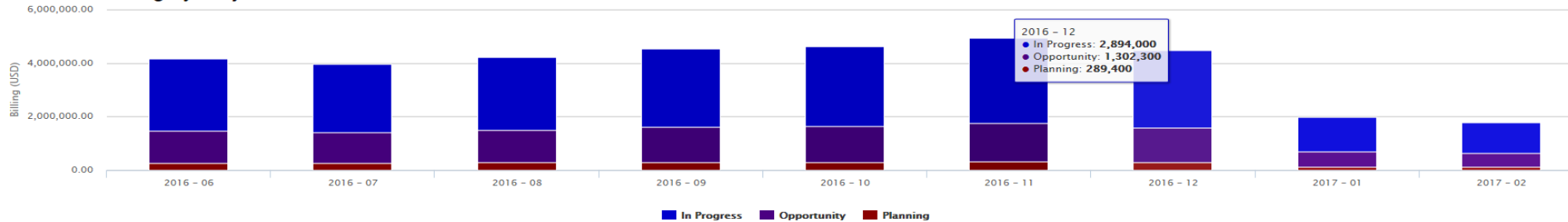
# PSA MAPPED TO YOUR BUSINESS PROCESSES



# STRATEGICALLY LINK WHERE YOU ARE AND WHERE YOU ARE GOING



Forecasted Billing by Project State



In Progress

Project	2016-06	2016-07	2016-08	2016-09	2016-10	2016-11	2016-12	2017-01	2017-02
Campus Project	320,000	320,000	400,000	320,000	384,000	336,000	320,000	80,000	0
Corporate Expense Tracking	704,000	704,000	672,000	768,000	640,000	672,000	768,000	192,000	0
FinXL Sydney	704,000	704,000	672,000	768,000	640,000	672,000	768,000	192,000	0
NPD Template Plan	0	0	0	0	0	0	0	640,000	1,152,000
PSA Implementation	0	0	0	216,000	480,000	528,000	192,000	0	0
Technical Support	1,100	1,100	1,100	1,100	0	0	0	0	0

Opportunity

Project	2016-06	2016-07	2016-08	2016-09	2016-10	2016-11	2016-12	2017-01	2017-02
Campus Project	144,000	144,000	180,000	144,000	172,800	151,200	144,000	36,000	0
Corporate Expense Tracking	316,800	316,800	302,400	345,600	288,000	302,400	345,600	86,400	0
FinXL Sydney	316,800	316,800	302,400	345,600	288,000	302,400	345,600	86,400	0
NPD Template Plan	0	0	0	0	0	0	0	288,000	518,400
PSA Implementation	0	0	0	97,200	216,000	237,600	86,400	0	0
Technical Support	495	495	495	495	0	0	0	0	0
Timesheet Deployment - FP	428,400	373,500	442,800	380,700	373,500	442,800	380,700	76,500	0

Planning

Project	2016-06	2016-07	2016-08	2016-09	2016-10	2016-11	2016-12	2017-01	2017-02
Campus Project	32,000	32,000	40,000	32,000	38,400	33,600	32,000	8,000	0
Corporate Expense Tracking	70,400	70,400	67,200	76,800	64,000	67,200	76,800	19,200	0
FinXL Sydney	70,400	70,400	67,200	76,800	64,000	67,200	76,800	19,200	0
NPD Template Plan	0	0	0	0	0	0	0	64,000	115,200
PSA Implementation	0	0	0	21,600	48,000	52,800	19,200	0	0
Technical Support	110	110	110	110	0	0	0	0	0
Timesheet Deployment - FP	95,200	83,000	98,400	84,600	83,000	98,400	84,600	17,000	0



# QUESTIONS?



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