June 2, 2016

Webinar Presentation

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

tsia TECHNOLOGY SERVICES INDUSTRY ASSOCIATION

Sponsored by Tenrox by upland

Today's Presenters:

John Ragsdale
VP Research, Technology and Social
TSIA

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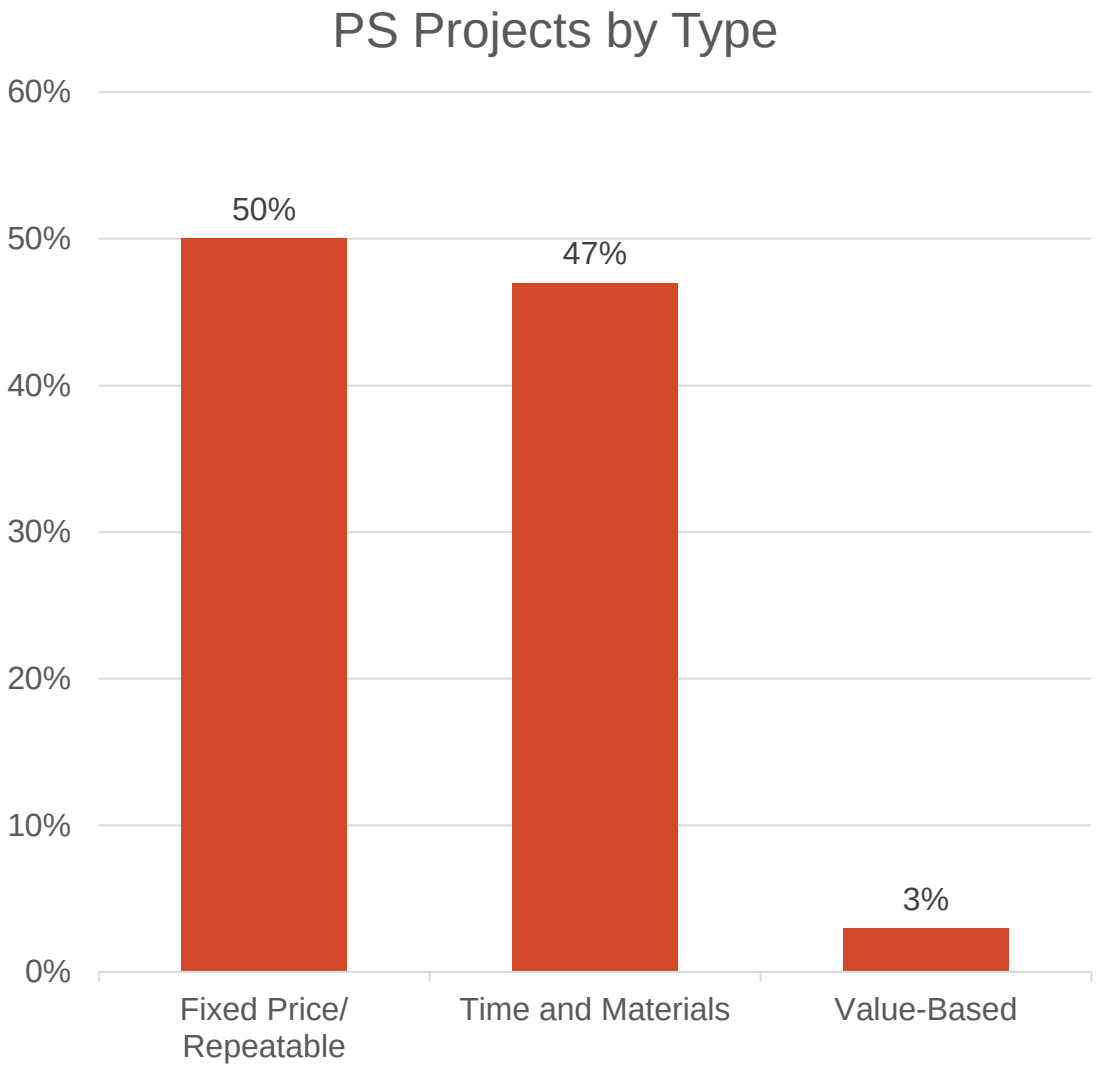
Sr. Solution Consultant
Tenrox by Upland

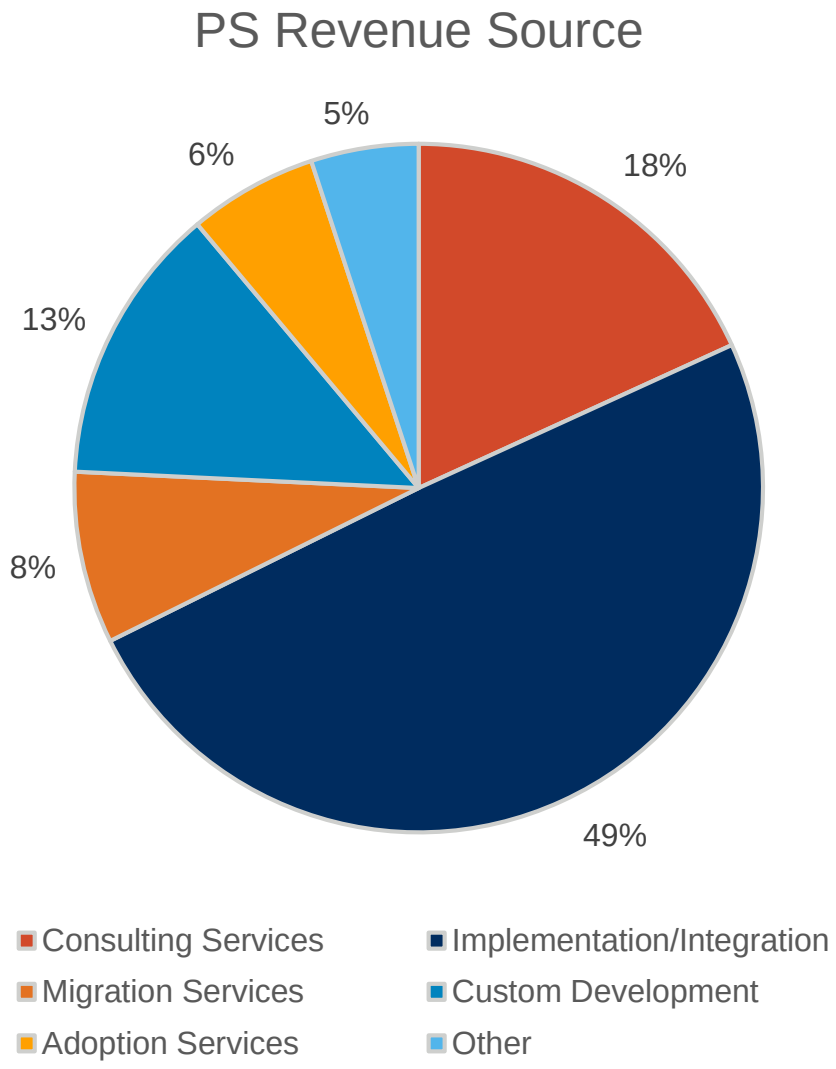
PSA Crystal Ball: 3 Ways to Predict Your Service Organization's Success

John Ragsdale

VP Research, Technology and Social
TSIA

Professional Services Projects in Transition

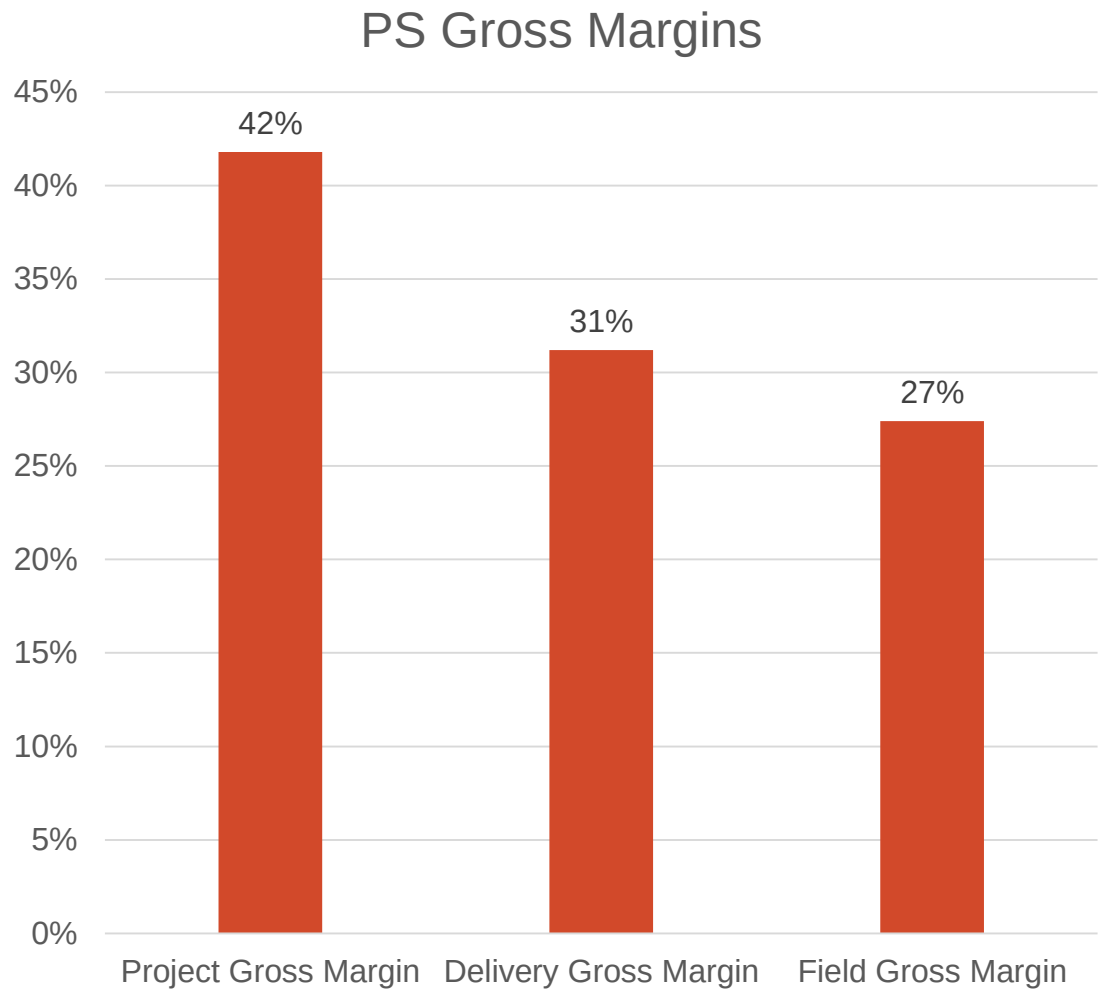




Source: TSIA PS Benchmark

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

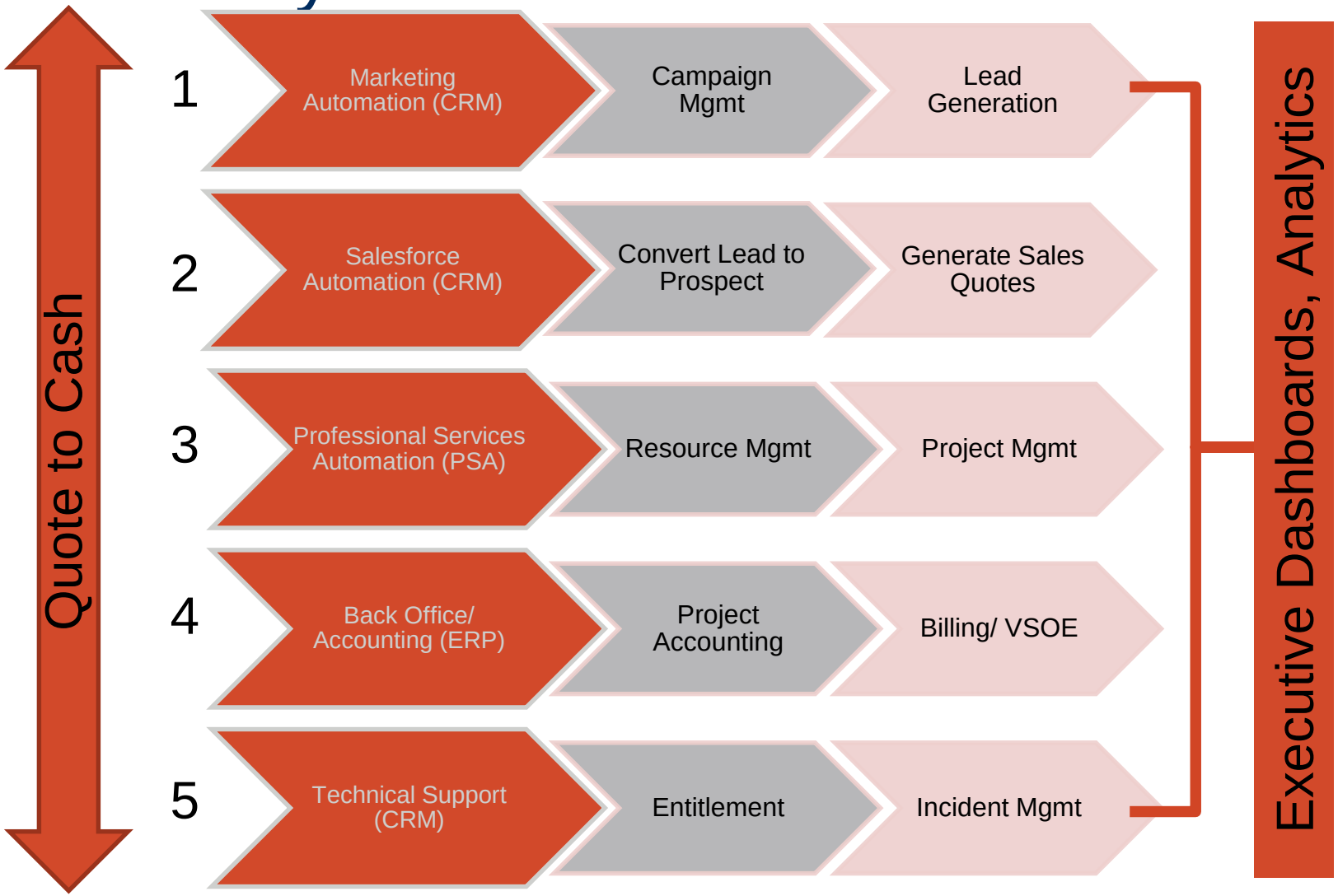


Source: TSIA PS Benchmark

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



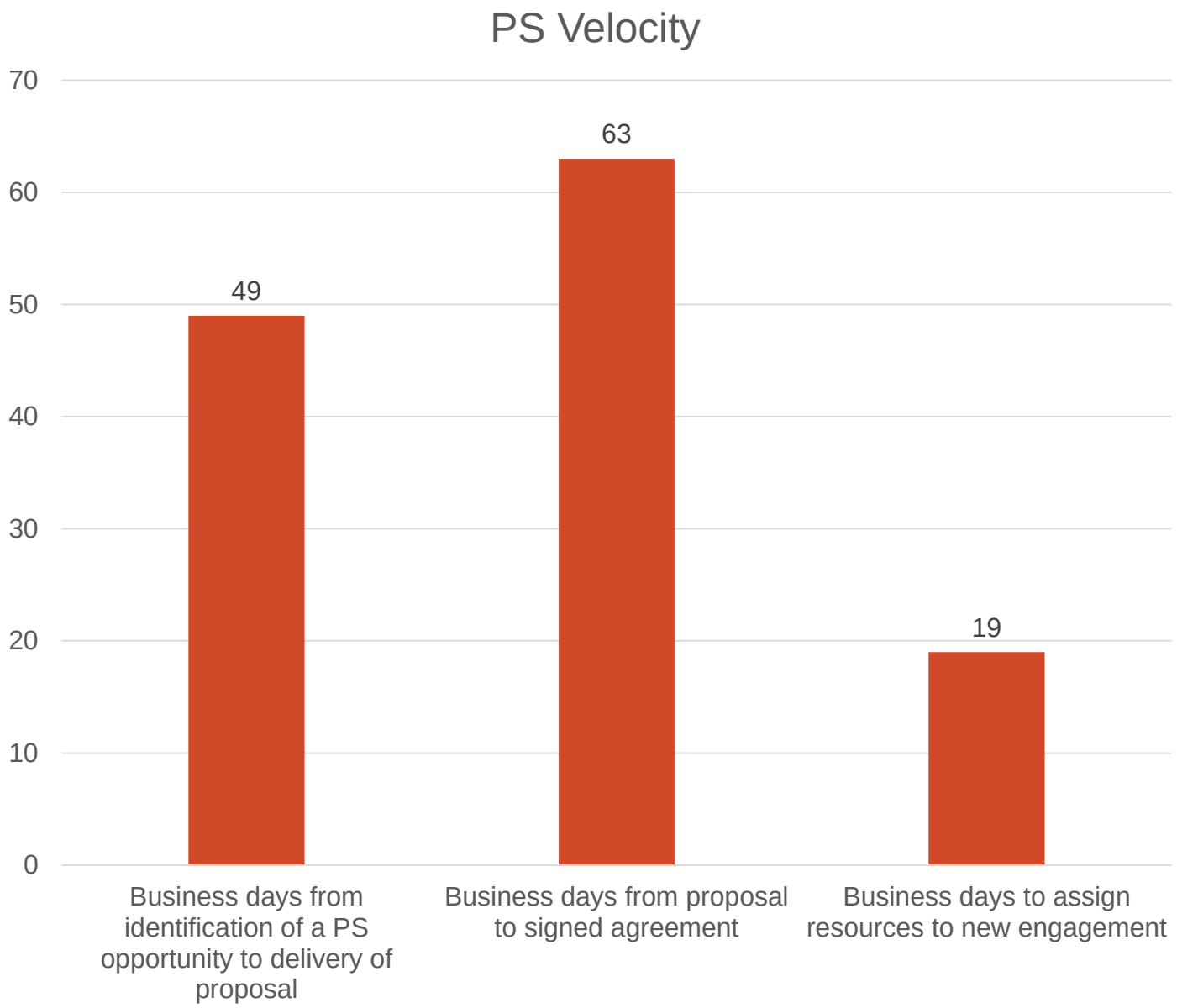
END TO END BUSINESS PROCESS, ENCOMPASSING CRM, PSA AND ERP

- 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.

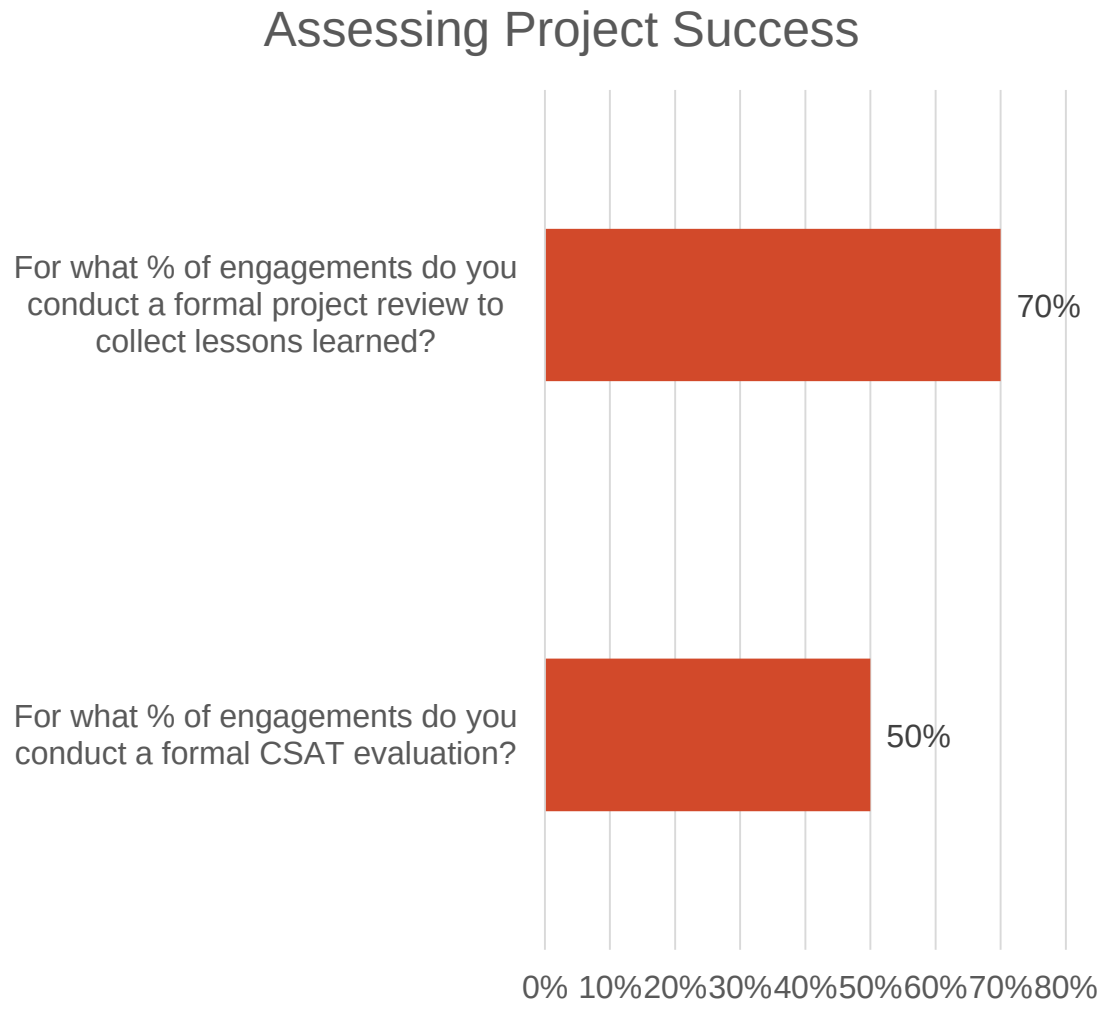
With a shift toward value realization and Customer Success, PS velocity must improve.



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



Source: TSIA PS Benchmark

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Neil Stolovitsky
Sr. Solution Consultant
Tenrox by Upland

UPLAND PRODUCT FAMILY

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

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- ComSci by upland
- Tenrox by upland

WORKFLOW AUTOMATION

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- Clickability by upland

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KEY DIFFERENTIATORS

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

THOUGHT LEADERSHIP

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

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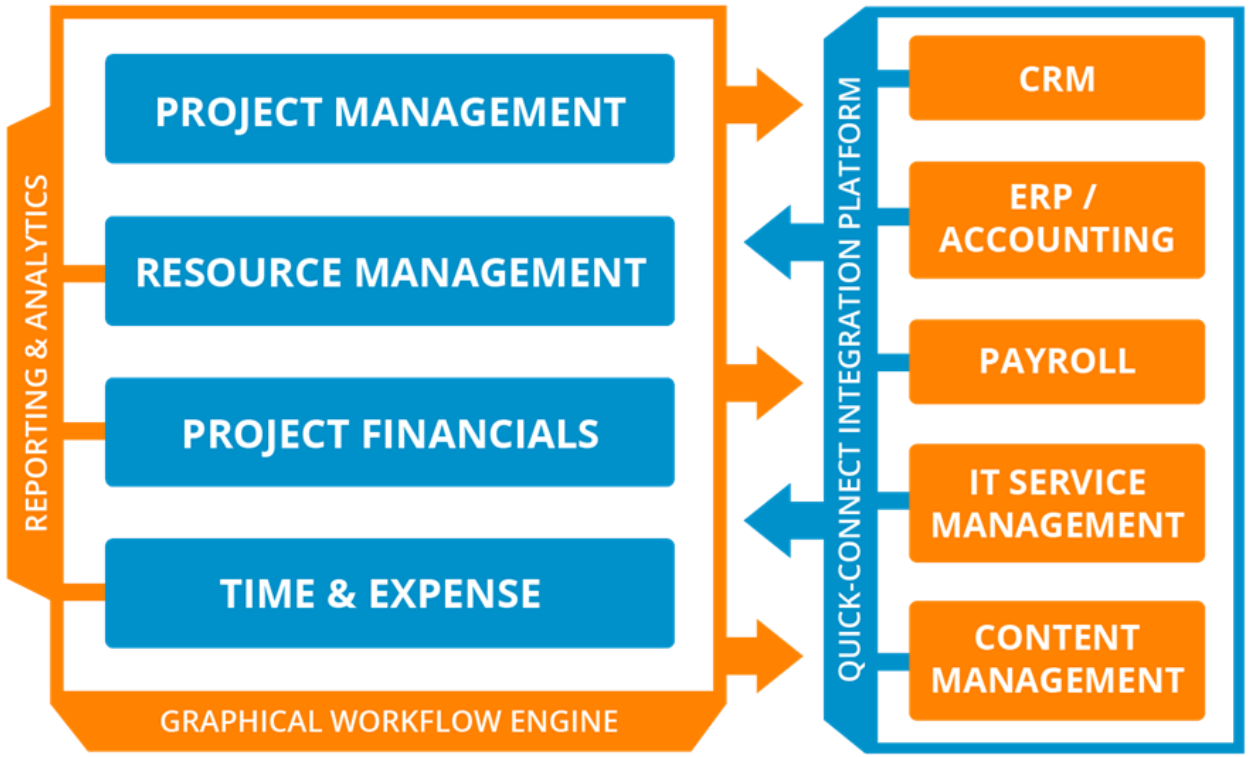
INCREASED VISIBILITY ACROSS THE ORGANIZATION



- 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

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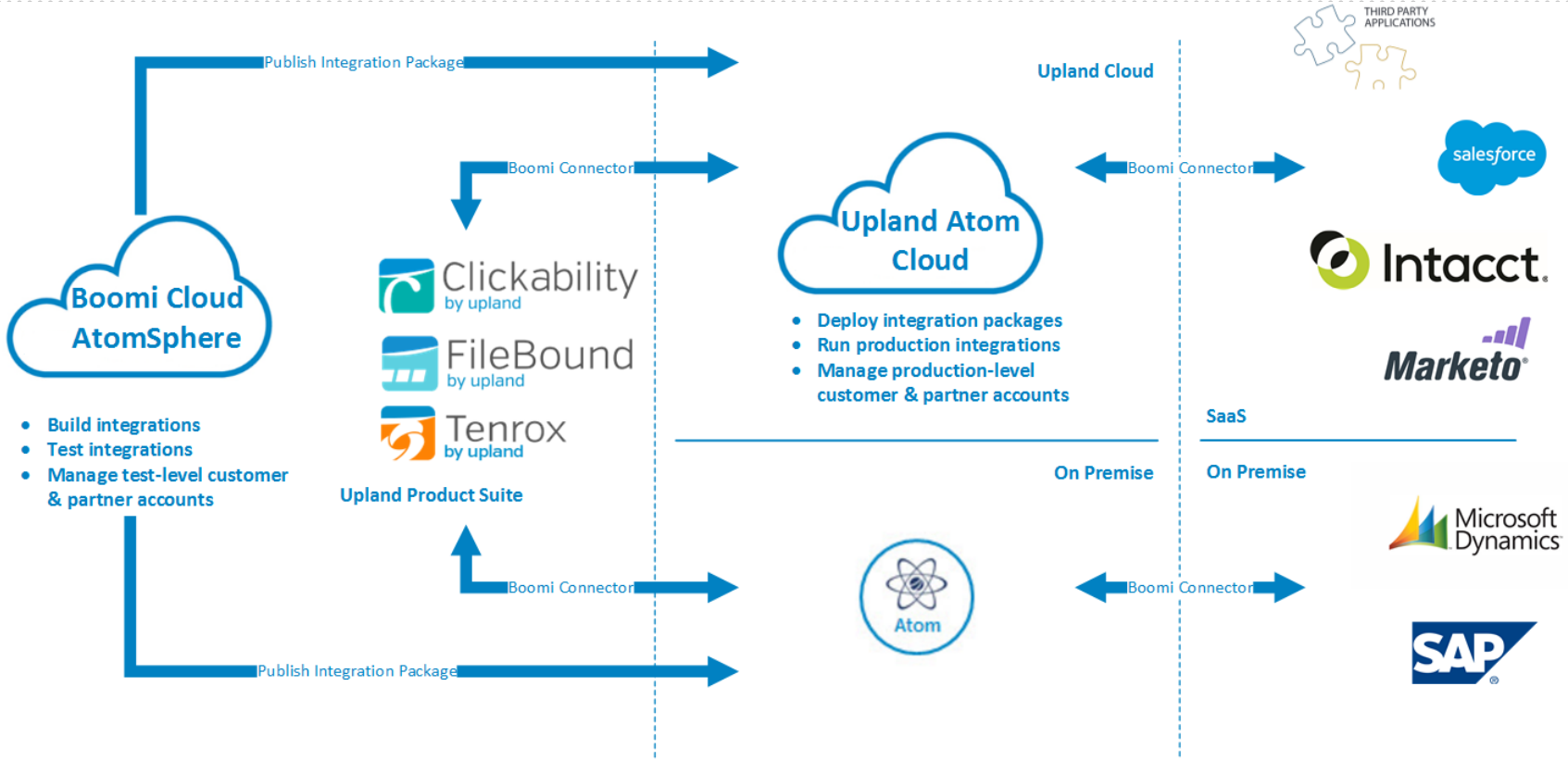
CLOUD PSA - EXTENDING THE STRATEGIC VISION WITH IPAAS



+ 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.

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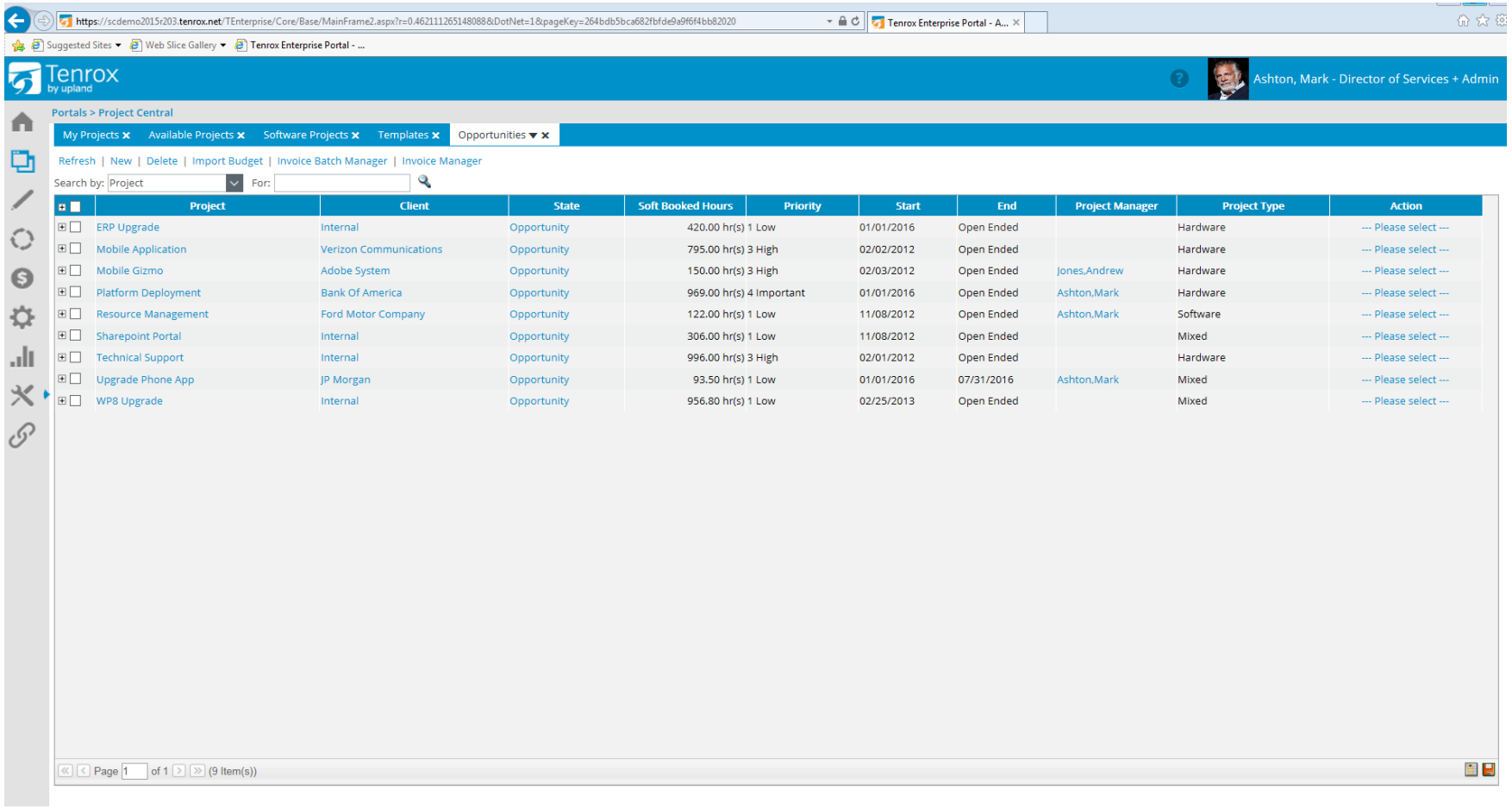
CENTRALIZE PROJECTS IN A SINGLE SYSTEM



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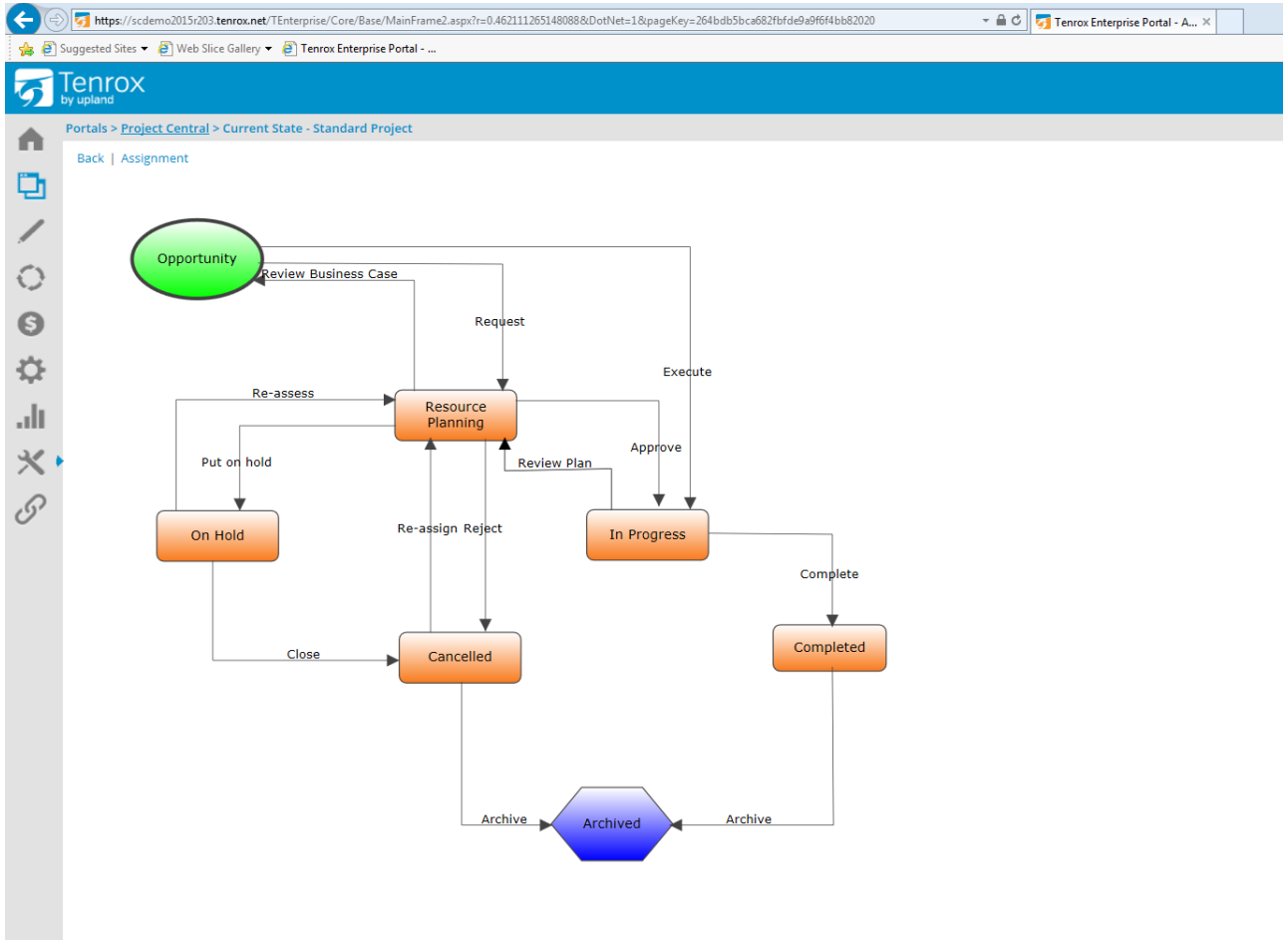
PSA MAPPED TO YOUR BUSINESS PROCESSES



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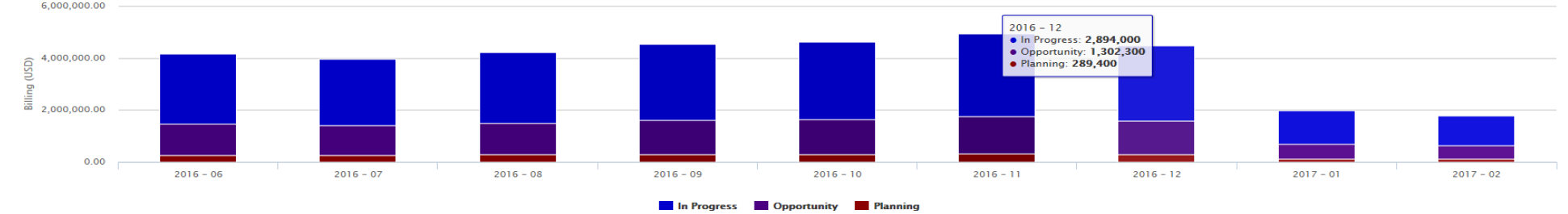
STRATEGICALLY LINK WHERE YOU ARE AND WHERE YOU ARE GOING



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

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QUESTIONS?

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