



EBOOK

CONNECTED SERVICES: THE FUTURE OF SERVICES ORGANIZATIONS

Uncover the key benefits of becoming a fully connected services organization while navigating challenges, integrations, and more!



THE CHANGING ROLE OF PROFESSIONAL SERVICES TODAY

The services industry is evolving due to technological advancements and the need for customer-centric experiences that are more profitable. The COVID pandemic has accelerated this trend significantly: higher customer expectations, more flexible delivery methods and business models, and the global expansion of remote talent. Combined, these forces are accelerating a shift to a value-driven, success measured approach to providing services.

For services organizations, people are their differentiators. Today, especially with remote delivery, people need to be connected to the right tools, data, and automation to provide more valuable experiences, streamline processes, and improve productivity.

This is at the heart of the business impact that Planview's Professional Services Automation solution provides for services organizations. It connects people with the right technology for client engagement, opportunity planning, flexible delivery, and financial insights – all empowering services organizations to delight their customers while driving profitable revenue.

Connected services transform the way companies deliver value for the business and customers. Today, it is essential for services and financial leaders to focus primarily on navigating the challenges that come along with a traditional professional services model to being a fully connected services organization.

By connecting systems, data, work, organization, people, and customers, Planview offers the future of connected services today – enabling new ways of working, operating at the speed of business, and adapting to evolving business models.

Discover the key to services success

In this eBook, we dive into the challenges that services and financial leaders may face as they look to move away from traditional services models. We also address the key benefits of becoming a fully connected services organization, what it means to be connected, integrations, and more!

Learn more about the following:

- ✓ Introduction to connected services
- ✓ Communicating with connected systems
- ✓ Working with connected delivery
- ✓ Becoming a connected organization
- ✓ Benefits vs the cost of not connecting

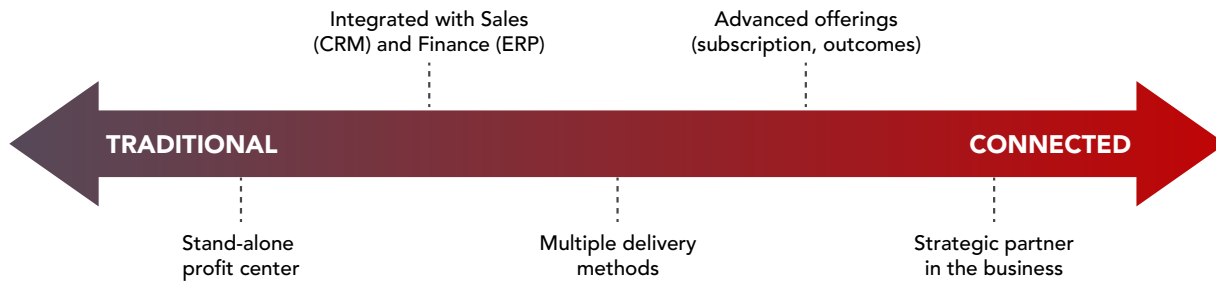


INTRODUCTION TO CONNECTED SERVICES

What Does It Mean to Be Connected?

In short, being connected means to be closely aligned with other parts of an organization moving towards a common goal. In other words, a critical link in the organizational chain to join customer and solution value.

Connectedness can be viewed as a continuum. Your organization can progress from being traditionally focused on generating profit as a singular business unit (weakest link) to the a connected business unit operating as a strategic enabler for the organization (strongest link).



WHAT DOES BEING CONNECTED GET YOU?

In a moment, we will look at the transformative advantages and benefits of establishing alignment between sales, service delivery, finance, customer success, and people operations and human resources – that is, becoming a connected services organization. First, however, it is important to appreciate that this journey is not just a technical change, but also a cultural shift.

With respect to the former, Technology and Services Industry Association (TSIA) in its newest book, [Digital Hesitation: Why B2B Companies are Not Reaching their Full Potential](#), points out that:

“Today’s business systems, operations systems, products, and services are all built completely separately from one another. In many cases, data from one system sits in complete isolation from others. Worse yet, many systems being used by organizations are based on legacy technologies that don’t easily allow for data exchange and integration. Unless you started with a blank sheet of paper and were born in the cloud, there is no single, unified philosophy for what data should be captured, how it should be captured, and what should be done with it once it is captured...the bottom line is that there is substantial underinvestment in data science, data technology, and data ontology.”



And with regards to shifting the cultural paradigm to establish and continuously evolve the vision of connected services – and prevent people, policies, and processes from reverting to the “old way” of doing things – in the book TSIA notes that:

“The fundamental challenge for companies on the digital transformation journey is the fact that it’s hard. Very hard...It requires a cultural shift for the leaders of every line of business (LoB) and every supporting business function to align on a common set of goals and objectives. It requires a fundamental understanding that, even though not apparent, every aspect of a business has the potential to impact all other aspects of the business.”

Admittedly, becoming a dynamic connected services organization is difficult. But it does not necessarily need to be daunting, or worse, dreadful. And the fundamental factor that determines whether the experience and results will be rewarding vs. regrettable is adopting a PSA solution that **connects** the full services lifecycle to produce a streamlined flow that delivers results and profitability while connecting to the broader organization.

Why is the word “connects” emphasized above? It is because in the large and growing PSA solutions marketplace – which is projected to reach 16 billion USD by 2025, which represents a CAGR of 11.7 percent from 2020-2025* – there are many vendors that claim to offer an “all-in-one PSA solution,” yet categorically fail to connect all the professional services pieces and fulfill this pledge

Considering this risk and reality, it is pivotal for your organization to focus on PSA solutions that deliver – not just promise – the following tangible and measurable outcomes:

Optimized Resource Management

Improving resource management means not just having the ability to see “who is doing what,” but to drill deeper and discover how resource assignments align with financial objectives. For example, leaders can analyze different scenarios, and verify that existing capacity will meet anticipated demand – and if not, then accelerate the recruiting pipeline to avoid a bottleneck. At the same time, this capacity ensures that resources are not left “idling on the bench” – which directly increases labor costs, erodes margins, and threatens profitability. It can also trigger disengagement and turnover (which we explore in a moment).

Before moving on, it is important to note that project management software vendors typically point to the “enhanced resource management functionality” of their respective products. However, a connected PSA software greatly expands on this capability with tools that enable organizations to maximize resource utilization across multiple contracts, when evaluating demand and capacity against resource skill sets and competencies.

* Grand View Research



Enhanced Customer Experiences

A major shift over the last couple of years – one that was not created by the pandemic but was certainly accelerated by it – is that customers are demanding that value is delivered faster, and in smaller iterations. This is forcing organizations to examine and, as necessary, re-invent business processes that replace complexity with simplicity, and ultimately improve customer experiences.

A connected PSA solution plays a key role throughout engagements by optimizing resources, mitigating service risks, and improving delivery processes. A [Forrester](#) survey of global professional services organizations around the world found that the number one benefit of PSA software adoption is improved customer satisfaction and advocacy.

Improved Revenue

Improving revenue includes the governance of revenue recognition. By connecting the organization, systems, and delivery efficiently, organizations have a clear view of opportunities to improve planning. More opportunities planned equals more revenue. The other side of that is reducing revenue leakage on client engagements. It is important to have clear expectations based on what the customer needs.

A strong PSA provides visibility into the work your resources are providing, which ensures time and expenses are accurately and promptly tracked against the contracted and forecasted amount. The SPI report notes that those who use a PSA solution see improved revenue growth year over year at 11.8% compared to those who do not at 8.7%.

For many professional services organizations, the biggest obstacle to consistently achieving full revenue recognition is difficulty enforcing consistent compliance with time and expense policies for operations.

A connected PSA solution achieves this mission-critical priority by establishing heightened governance for time and expense administration, which ensures fluidity and sound business operations.

With connected services your services organization can expect a smoother flow of info between PSA and ERP to get the revenue recognition right – regardless of whether this is configured as an end-to-end process with PSA or an ecosystem with ERP running the revenue recognition.

In addition, professional services organizations are responsible for providing accurate revenue with respect to public accounting standards ([ASC606](#) and [IFRS15](#)). Robust PSA software creates scalable and repeatable structure and governance in categorization of revenue recognition methods. This drives efficient auditable revenue recognition, which enables profit and loss margin real-time visibility.



Increased Billable Utilization

A connected PSA software provides built-in tools that maximize billable resource utilization across multiple engagements when evaluating demand and capacity against resource skill sets and competencies. The ability to organize and optimize resourcing for financial margin targets is a meaningful change, and one of the most powerful advantages of becoming a connected services organization.

Improving billable utilization is part of a core PSA functionality. For a connected services organization, having the whole lifecycle moving more efficiently means fewer bottlenecks that could delay getting work to the field, thus improving billable utilization by preventing gaps in billable work.

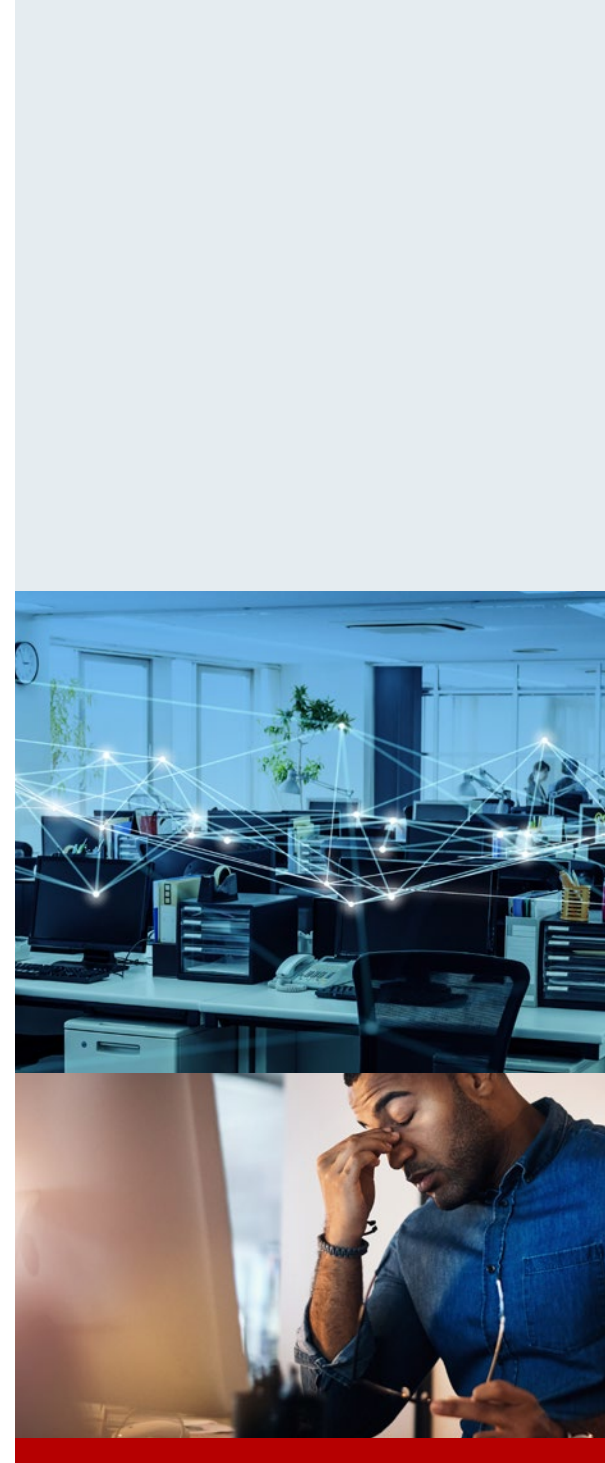
Higher Employee Retention

A saying is making the rounds on the human resource landscape: “the war for talent is over – talent won.” Yet, what is making the post-pandemic labor shortage unique, is that many employees are not quitting exclusively or primarily because they want more compensation elsewhere. Rather, they are heading for the exits because they are unhappy with the overall work experience. As [McKinsey](#) notes:

“Today, many people are quitting for different reasons than they did historically, and organizations are on high alert. For many employees who are disillusioned, grieving, or burnt out, the prospect of muscling through doesn’t feel sustainable – no matter the increase in compensation. People are taking stock of their lives and are more likely than ever to change their career trajectory in notable ways.”

Furthermore, consulting advisory website [Consulting.us](#) points out that professional services employees face higher rates of burnout than most other jobs, owing to heavy workloads often more than 80 hours per week, tight deadlines, and hefty travel schedules (which paused for the last couple of years but are now [ramping back-up to pre-pandemic levels](#)). And while no cohort on the professional services landscape is immune from burnout, in recent months, awareness is growing that junior staff are particularly vulnerable – and many are being forced out of the professional services sector altogether.

A connected PSA solution streamlines, simplifies, and standardizes complex service delivery, in a manner that enhances employee engagement and performance rather than diminishes it. At the same time, it can improve client and employee retention by ensuring that engagements are appropriately staffed with the right professionals, at the right time.



Greater Profitability

The confluence of using a connected PSA solution to improve resource management, customer experience, revenue, billable utilization, and retention is a critical metric. As noted by [Service Performance Insight](#):

“[PSA solutions] continue to drive significant operational performance benefits, yielding higher revenue and profit for professional services organizations...PSA solutions help match the right resources, with the right skills at the right time to the right projects. PSA solutions yield several core benefits to PSOs, but most executives only need to look to the relative 11% (from 68.1% to 75.3%) increase in billable utilization as a primary reason to select PSA. (parenthesis in original)”

This is an essential balance between long-term customer value, success, experience, and profitability. It is also possible to be a high growth, high profitability organization, and becoming connected improves the method of achieving this.



HOW IS THIS ACHIEVED?

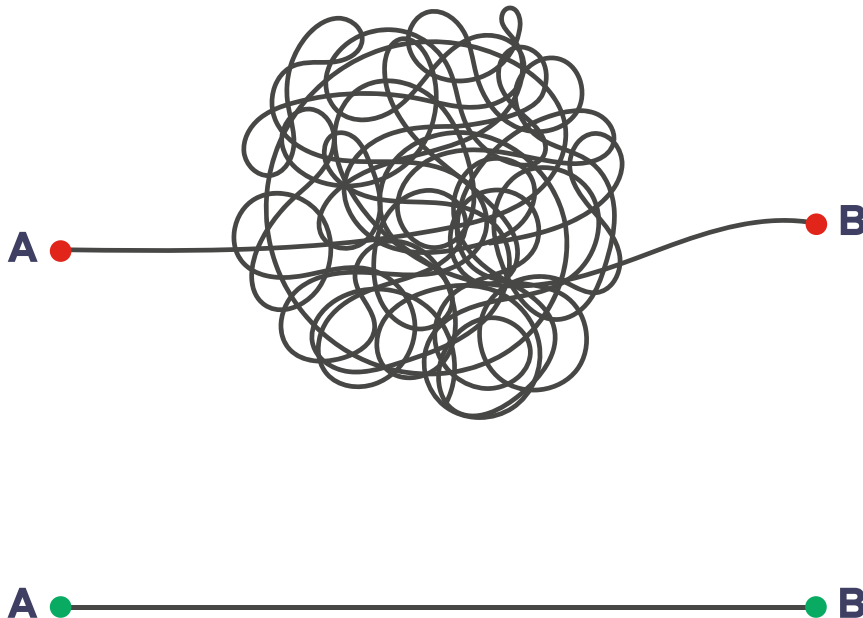
In the previous section, we highlighted the transformative benefits and competitive advantages of establishing a connected PSA solution as the foundation for becoming, remaining, and evolving as a connected services organization. The next big question to address is: how is this achieved?

For services and financial leaders, it is essential to understand what integrations and human interactions go on “behind-the-scenes” that enable your organization to consistently:

- ✓ Centralize key processes and optimize the services end-to-end lifecycle profitability.
- ✓ Support engagement confidence by successfully delivering business outcomes for customers.
- ✓ Establish full, comprehensive visibility that drives decision-making.

Another way to look at this inquiry is by asking: how do you bring together previously disconnected systems and teams – to turn an excessive amount of raw information (and all who work with customers) into actionable, reliable, and profitable business intelligence and experiences?

The answer involves the confluence of connected systems, delivery, and organization. Connected systems is a key starting place – and therefore, it is the first aspect that we will explore.



COMMUNICATE WITH CONNECTED SYSTEMS

Why are connected systems the key to unlocking the benefits of being a truly connected services organization? Essentially, it is rooted in visibility. Visibility is especially important in times of economic turmoil and uncertainty, since it drives better planning, deepens customer trust, and leads to more successful and profitable engagements.

As [Service Performance Insight](#) states in its 2022 PS Maturity™ Benchmark:

“Top performing services organizations have deployed integrated business applications across all aspects of the business, giving them unprecedented visibility and control to see and take advantage of business changes in real-time...SPI’s benchmarking studies show the undeniable impact PSA has on all aspects of service execution. Effective resource management manifests in better staff retention, higher levels of billable utilization and significant improvements in on-time, on-budget project delivery. ”

As we dive deeper into establishing communication with connected systems, let us look at some of the main systems in the ecosystem that enable actionable information and collaboration between people – because that is where the connection exists. Remember: it is much more than just data integration!

Customer Relationship Management (CRM)

All professional services work begins in sales and the opportunities they are working, which is typically governed by a CRM system (e.g., Salesforce, SAP, Microsoft, Oracle, etc.). As described by the [2022 Service Performance Insight Benchmark survey](#), establishing a seamless PSA-CRM connection where opportunity data flows bi-directionally enables organizations to identify, assess, and target opportunities with more accuracy. Why is this important? Because it allows organizations to better plan their resources by having a clearer forecast and be involved in deals earlier to help set expectations, client satisfaction is met and exceeded.



Enterprise Resource Planning (ERP)

Just as all sales information is captured by the CRM, all revenue and expenses end up in the ERP system (or financial system of record). Some scenarios call for sending billing and expense info from the PSA to the ERP, while others may call for creating the billing and revenue recognition in the PSA and sending the financial results to ERP.

By integrating ERP as part of the connected services ecosystem, your organization can:

- ✓ Enhance the connection with your financial partners.
- ✓ Ensure accuracy regarding work details.
- ✓ Reduce stress, frustration, and manual work/re-work.
- ✓ Improve invoicing, revenue recognition, financial results, and business forecasting.

All of this leads to happier business partners and more successful, profitable engagements.

Human Capital Management (HCM)

Human Capital Management (HCM) solutions (also known as talent management solutions) give employers the tools to effectively recruit, hire, onboard, train, evaluate and compensate employees. By tracking performance, skills, and career progression, HCM helps companies create and maintain a high-performance workforce.

By integrating HCM and PSA, organizations have a more comprehensive view of their employees as they plan what work they will take on and when. It allows resource managers to capture and update accurate information on your employees' skills and goals, to enhance the relationship, increase engagement, and facilitate better overall employee experience.



Other Systems

We have highlighted that communicating with connected systems involves most commonly integrating PSA software with CRM, ERP, and HCM platforms in the ecosystem. However, other systems can be added to the ecosystem as well, such as (but not limited to):

- Configure, Price, Quote (CPQ)
- IT Service Management or ticketing system (ITSM)
- Agile Development Software

In addition, all PSA solutions either have BI built in, or connect to leading BI solutions to provide analytics and visibility across the PS lifecycle depending on the level of analysis and supplemental data added.

BENEFITS OF HAVING CONNECTED SYSTEMS

Earlier we noted that the purpose of connected systems is not just to integrate data, it is to establish full visibility and generate actionable information.

An insightful way to look at this advantage is provided by TSIA in its [Digital Hesitation](#) book, which proposes that a critical “North Star” question be asked:

If we had the data, we could do X and no longer have to do Y?

The ability to answer this question enables services organizations to discover how to strategically and sustainably transform complexity into simplicity, while maturing from stage one (recurring revenue, as-a-service offers, and more connected products) to stage two (easing the customer journey to value and delivering more at lower costs). Ultimately, it leads to several enormous competitive advantages including:

- ✓ **Better customer experiences:** planning for opportunities earlier in the process and setting clear expectations through delivery to streamlining the billing and invoice processes.
- ✓ **Better employee experiences:** better utilization, assigning resources to projects that align with their career progressions and skills, and streamlining workflows reducing administrative strain.
- ✓ **Better efficiencies:** faster speed of business, reduction of errors, and greater accuracy of information.



COST OF NOT CONNECTING SYSTEMS

Sometimes, the motivation to improve is more powerful when we reflect on the consequences of inaction. Here are some of the costly problems and pitfalls of not being a connected services organization in today's business landscape:



Inconsistent delivery: Critical details about the customer are not relayed, which leads to delays and negative experiences. Since happy clients are the lifeblood of all professional services organizations (embedded and standalone) and managed services providers, the costs of inconsistent delivery are enormous.



Forecast volatility: Without connected systems, there is no clear and reliable view of what is happening ahead (short-term and longer-term). This leads to bad planning – as the old saying goes “garbage in, garbage out” – and it also contributes to excessive resource costs.



Move slower than business: Without a strong and seamless connected systems approach and infrastructure to tie work effort to strategic initiatives, it is impossible to keep up with the vision and objectives.



Resourcing pressures: Failing to generate actionable information, and leveraging this to drive effective collaboration between people, is like driving while looking in the rearview mirror instead of through the windshield. Resourcing decisions are inevitably delayed and cost significantly more than they should.



HOW TO ACHIEVE CONNECTED SYSTEMS

How can your organization achieve connected systems, and realize the rewards and benefits? Here are some best practices:



Clear planning and process alignment: bring stakeholders in to discuss needs, so that the technology fits those requirements. [Tips for getting leaders](#) and other decision-makers interested and engaged include being clear, honest, collaborative, and prepared



Pay attention to management: evolving to a connected services organization is not just a technical shift, but it is also a cultural shift. [Organizational change management](#) (OCM) areas to focus on include the following:

- **Preparation:** Prepare your organization by helping employees recognize, understand, and accept the need to add (or replace) systems and workflows.
- **Planning:** Build a vision and plan for change by identifying strategic goals, key performance indicators, project stakeholders and team, and project scope.
- **Empowering:** Implement changes, while at the same time empowering your people throughout the process. Effective and consistent communication is critically important, especially when it comes to reminding employees why change is happening.
- **Culture:** Embed changes within your organization's culture and practices. This makes the change "stickier," and helps prevent a reversion to old processes and patterns.
- **Lessons Learned:** Review progress and analyze results, to support future change management initiatives.



Update processes: if necessary, consolidate systems and inefficiencies in the lifecycle. The vendor behind your PSA solution should play an active role. Support can take various forms such as:

- **Knowledge Sharing:** providing you with insights and lessons learned from other implementation experiences (while of course respecting client confidentiality).
- **Resources:** helping you develop resources, communications, and materials to help your employees immerse themselves in the new PSA systems as quickly and easily as possible.



WORK WITH CONNECTED DELIVERY

Gone are the days when the only methodology in the professional services department toolbox was waterfall. Of course, waterfall methodology is still quite common and has its place; especially for more traditionally structured projects. But there are other valid – and in some scenarios, far superior – approaches that are supported by a connected delivery infrastructure. For example:



Traditional: an implementation project which is typically limited in scope and often proceeds in sequential phases which require a traditional waterfall approach, although hybrid approaches are also used. The work is done when the implementation is completed.



Kanban: which is seen when delivering work in subscriptions. Report Development as a Service the report developers can work with the customer to prioritize the reports in queue and then pick off the top as they move each report “card” to the next step.



Agile: which is commonly seen in software development, is a more “product” approach to delivering technical services on an ongoing basis using development features or deliverables with Agile stories in sprints. Scaled Agile approaches are also sometimes used.



Activities: which are seen in ongoing managed services engagements. Managed Services will use a traditional ticketing system to prioritize and dispatch work to the team. This “Activities” capability can be provided by the PSA system or through integration to an ITSM system.

Many PSA solutions do a decent job of supporting one or two ways of working. However, it is important to connect your PSA solution with other systems in the ecosystem that are used for work delivery (or that may be added to the approach/methodology roster in the future).



WHAT ARE THE BENEFITS OF CONNECTED DELIVERY

Connected delivery provides you with more flexibility to align delivery methods to support multiple billing methods, such as time and materials (T&M), fixed fee, packaging services as subscriptions, or outcomes achieved. It also aligns the method with the type of work (e.g., traditional with implementation projects, Agile with software development, Kanban with retained services such as Admin-as-a-Service).

The connected delivery infrastructure – which is anchored by a connected PSA solution— supports each of these business methods, so that the best option can be selected based on your organization’s policies, project dynamics, and customer preferences or requirements. This leads to:

- **Better customer experiences:** work is done more efficiently with better visibility and clarity in client engagement health.
- **Better employee experiences:** employees have more flexibility to choose the right delivery method with less administrative strain.
- **Better business outcomes:** many of these methods also lead to more direct collaboration with the customer for more on-target results, leading to better achievement of business outcomes.

THE COST OF NOT ENABLING CONNECTED DELIVERY

What are the costs of failing to enable connected delivery? The consequences include:



Inconsistent delivery: Using suboptimal methods leads to delayed delivery that does not meet customers’ expectations.



Resourcing pressures: Suboptimal use of resources leads to under- or over-utilized resources and decreased employee satisfaction.



Outdated business model: Customers today expect leading edge delivery methods that align more closely to their outcomes.



HOW TO PROVIDE CONNECTED DELIVERY FOR YOUR PROFESSIONAL SERVICES ORGANIZATION

So far, we have looked at the importance and advantages of communicating with connected systems and enabling connected delivery. The next question is: how do you provide connected delivery for your organization? Consider the following best practices:

- ✓ Ensure that the tools you use are natively flexible and support multiple ways of working.
- ✓ Create a seamlessly integrated ecosystem of delivery and resourcing tools that align with the financial compliance requirements, aligning work breakdown structure with financial structure. For example, integrating your PSA solution with Azure Dev Ops allows you to work in multiple ways, such as waterfall, activity, and agile.



BECOME A CONNECTED ORGANIZATION

The traditional approach of a services organization focuses solely on the performance of their professional and/or consulting services. However, this can trigger multiple challenges that obstruct digital transformation – subsequently blocking your organization’s opportunity at becoming a connected services organization. [Service Performance Insight](#) highlights some of the problems that leaders face:



Unclear strategy: Lack of clarity regarding target markets, target clients, and “why we win.” Difficulty capitalizing on market opportunities due to lack of alignment, lack of employee engagement and/or leadership, and cultural issues. No leverage to drive repeat sales, limited competitive differentiation, poor sales, marketing, and service delivery execution.



Lack of alignment: Unclear service charters – which is particularly a problem for embedded service organizations – with conflict between driving revenue and margin vs. helping the organization achieve market expansion and client adoption objectives.



Silos: These exist in all companies and typically occur between groups/functions where responsibility and accountability are blurred. This often manifests as confusion and conflict around who is responsible for driving new service revenues: sales or delivery?



Reactive not proactive: This happens when organizations lack real-time visibility into all facets of the business. As a result, leaders must rely on past business performance vs. spot trends and take advantage of them in real-time. Running the business by spreadsheet makes administration overly burdensome and error prone. Managers have no ability to analyze and recalibrate to take exploit changing market conditions, which leads to missed targets and a demoralized workforce.



Skills imbalance: This is the logical extension of organizational silos. Organizations are not fully selling what can be delivered, or not delivering on what has been sold. Consequences typically include excessive non-billable headcount, sub-par utilization, and both recruitment and retention difficulties



On the other end of the spectrum are organizations that have achieved connected services by aligning all services (professional, support, customer success, education, field, and managed) and customer success ideally under one executive (like a Chief Customer Officer). As a result of this modern approach, professional services teams have become key participants in:

- **Customer success by contributing to enhanced customer experience, adoption, expansion, and renewal.**
- **Strategic planning for professional services initiatives.**
- **Enterprise project management office (EPMO) operations through internal cross-functional work.**
- **Product development through understanding the product roadmap and developing new service offerings.**

An interesting and insightful way to grasp the totality of alignment across all services (in order to optimize customer success) is provided by the TSIA [Digital Hesitation](#) book, which encourages leaders to think of digital transformation and the organization as a neural network. It is not just one department, or one project: it is all connected!

Thinking of the organization as a neural network reminds leaders that they must be relentless about transforming complexity into simplicity. Notes the TSIA Digital Hesitation book:

“Synchronization among departments is becoming critical because we often see companies that have different departments transforming at shockingly different speeds. Out of synch departments cripple the DCX (Digital Customer Experience). When this happens, customers are experiencing the company more like several different companies.”

This warning applies to all professional services organizations, whether they are a standalone enterprise or embedded into a larger product company. Services must be connected to all other parts of the organization, so that the experience is consistent and simple, while focus remains on adoption, retention, and unlocking more value.

Indeed, services are the glue between the products and processes clients want to use, and the value they receive from it!



WHAT ARE THE BENEFITS OF CONNECTED ORGANIZATIONS

The benefits of becoming a connected organization include:



Better customer experiences: by connecting the full customer lifecycle from initial sale, through services delivery, and into customer success creates consistent and familiar experiences for your customer at each interaction across their journey with you.



Better employee experience: by connecting their work to customer success and the strategic direction of the company gives your resources more purpose and insight into the broader impact they make for the business and customers.



Better efficiencies: as characterized by alignment with strategic initiatives, and collaboration with internal partners who are united on both customer and business success. This means less administrative work, manual processes, and wasted efforts on work that does not provide impact.



COST OF NOT DOING IT

What are the costs of failing to become a connected organization?
The consequences include:

- **Moving slower than business:** you end up a laggard behind the vision and objectives of your organization making you look like less of a strategic partner and revenue generator and more like a cost center.
- **Misaligned business model to market desire:** outdated business models prevent you from moving as a unified organization through digital transformation and will affect the business's ability to transverse digital transformation and meet growth and profitability goals.
- **Friction points:** struggling to overcome barriers in transforming to XaaS and outcome aligned pricing (more on this below) will cause friction between Sales, Customer Success, and customers who are asking for leading edge solutions.

For this latter point, TSIA in its [Digital Hesitation](#) book highlights some common friction points:

- **Unwillingness to structure for success:** Most companies need to support legacy offers, while they build out new offers. However, asking employees to focus on the old and new at the same time does not work well. The successful approach is to segment resources and create dedicated teams for developing, selling, and supporting the new offers.
- **EBITDA above all else:** business model transformation and short-term profitability are two mutually exclusive objectives. There may be a short-term tradeoff between profitability and business model transformation, but the long-term goal is a modernized business model that is profitable.

HOW TO BECOME A CONNECTED ORGANIZATION

How do you become a connected services organization? Best practices include:

- ✓ Structure your organization in a manner that allows people to be involved in meaningful, non-billable work.
- ✓ Connect to customer success by adding retention targets to your services organization's KPIs.
- ✓ Consider consolidating services and customer success under one Chief Customer Officer.
- ✓ Use OKRs and/or other strategic planning paradigms to ensure strategy is connected to execution across the organization - including in Professional Services.
- ✓ If you are an embedded professional services organization (ESO), ensure that your services offerings are aligned with product roadmaps.



CONCLUSION

At Planview®, we offer a powerful PSA solution that enables professional services organizations of all kinds – whether you are looking to manage client delivery work for better results and profitability or streamline your services business end-to-end for complete performance and financial governance.

Become a fully-fledged connected services organization, and reap the transformative rewards discussed in this eBook!

Our range of capabilities covers the entire services lifecycle ranging from Opportunity to Delivery to Billing and Revenue Recognition. We continuously build upon these capabilities, while continuing to bring our customers robust services capabilities that are adapted to the change that services organizations are going through today:

- Customers today demand frequent, iterative delivery of value through flexible delivery methods. Planview offers a wide range of solutions for all types of work that will connect seamlessly to our PSA solutions.
- Connecting PSA to the broader enterprise starts with plugging professional services into the corporate strategy. Planview has a family of solutions from Strategic Planning to PPM to [Work Management](#) that our customers can leverage.
- Engaging customers, while increasing system integration starts with our dedication to connect services. This includes various points of the engagement lifecycle such as CRM systems for customers and opportunities, HCM systems for personnel, and ERP and Financial systems to report and record revenue.

Planview has a long history in the professional services space partnering with a wide range of organizations across the mid-market to Fortune 500 organizations. Connected Services is the future of services organizations, and the Planview PSA solution is the way.



DISCOVER MORE RESOURCES FOR YOUR CONNECTED SERVICES JOURNEY!



ON-DEMAND PRESENTATION: Are You a Connected Services Organization?

Disconnected services, systems, data, and people make it harder to meet your goals. If you can relate, you may be losing revenue, diminishing customer experiences, and putting more pressure on profits margins. What should you do about it? Ask yourself, are you connected to your company strategy? Are you connecting your sales with opportunity planning? Are you providing client work in the way that best works for them? Are you connected to customer success to ensure adoption and retention?

In this on-demand presentation session (originally delivered live at TSIA: Interact Spring 2022) by Planview's Director of Product Management, Dave Blumhorst, learn what it means to be a connected services organization, why it is important, and a few steps you can take to make confident connections.

[Click here](#) to watch the presentation.



BUYER'S GUIDE: Professional Services Automation

Our Professional Services Automation Buyer's Guide breaks down what to focus on for a best-fit Professional Services Solution, while also helping you discover key features to maximize your output and achieve three fundamental objectives:

- Centralizing key processes and optimizing the services end-to-end lifecycle profitability.
- Supporting engagement confidence by successfully delivering business outcomes for customers.
- Establishing full, comprehensive visibility that drives faster and better decision-making.

[Click here](#) to download the PSA Buyer's Guide.



SOLUTION BRIEF: Planview for Professional Services

Our Solution Brief "Planview for Professional Services" explores how our PSA solution powers the entire services lifecycle from opportunity to billing, advancing operational effectiveness and visibility needed to maximize utilization, improve customer satisfaction, and increase profitability.

[Click here](#) to download the Solution Brief.

