



Streamline Communications With A STEPWise Salesforce.com And OpenAir Integration Assessment

Do you have inconsistent data in your Salesforce.com and OpenAir system? Are multiple people entering the same data? CRM and PSA tools provide great benefits of standardization and visibility into your business process. If your systems and process are not integrated, conflicts can come between sales and services. This can create the need to enter redundant data in both systems, increase risk of errors, and most importantly defocus your team from their primary tasks of generating revenue and managing profitable projects.



In less than one week, TOP Step Consulting, a leader in providing efficient business operation solutions, will show you how you can improve the flow of information between your Salesforce.com and OpenAir systems freeing your team of redundant administrative tasks so they can focus on high value work!

Benefits of STEPwise Salesforce.com and OpenAir Integration Assessment

- ◆ **Reduce redundant data entry**
- ◆ **Improve data accuracy**
- ◆ **More timely reporting**
- ◆ **Ease the transition from Sales to Services**
- ◆ **Guided by experts in OpenAir who are Salesforce.com certified**



The Process and What to Expect

Step 1: Sales to Service Process Workshop

The Sales to Service Process Workshop provides a understanding of your current business model specific to areas of Sales tracking and pipeline transition to Services. We capture how the daily business operations are currently managed, understand the improvements available, and any known issues impacting your operations.

Step 2: System review

Next we review the OpenAir and Salesforce.com configurations including how you are using the OpenAir and Salesforce.com systems, the features activated, types of opportunities/projects, and key data within both systems.

Step 3: Before and After Proposal

We perform a gap analysis of your Sales To Service business model and system configurations and usage. We construct an easy to understand Before and After Proposal so you can easily compare what you have now to our recommendations. The full report includes:

- ◆ Recommended integration options between OpenAir and Salesforce.com
- ◆ Recommended process changes in your organization
- ◆ Suggested Administration activities
- ◆ Suggested Training activities

You determine what to implement. It's completely up to you! When you decide, TOP Step can continue being your implementation advisor to ensure you are getting the most out of your OpenAir and Salesfore.com integration.

What is STEPwise?

STEPwise is a complete set of services designed to focus on 4 core steps towards maturing and creating business efficiencies in your PS Operations.

- ◆ **Strategy**
- ◆ **Tools and Implementation**
- ◆ **Education**
- ◆ **Process Monitoring**

To learn more go to:

www.topstepconsulting.com/answers

About TOP Step Consulting

TOP Step Consulting improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business.

Our experts have extensive experience in PS business operations, project management, and PS automation with both local and global Professional Services organizations.

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