



# How Progress Software Professional Services Took “Global” from Concept to Reality

## Background

Progress Software Corporation is a global enterprise software company that enables organizations to achieve higher levels of business performance by improving operational responsiveness. Operational responsiveness is the ability of business processes and systems to respond to changing business conditions and customer interactions as they occur.

Progress Software offers a portfolio of best-in-class real-time software solutions providing enterprises with significantly improved operational responsiveness within all events and activities that they participate. A key offering is the Progress® Responsive Process Management (Progress RPM™) suite that provides comprehensive visibility and insight into business systems and processes, event processing to respond to events that could affect performance, and business process management enabling companies to continually improve business processes without disruption to their ongoing operations or technology infrastructure. Progress RPM™ enables enterprises to achieve a higher level of business performance. Progress Software also provides enterprise data solutions providing data access and integration, and application development platforms for application development and management, and SaaS enablement. Progress Software maximizes the benefits of operational responsiveness while minimizing information technology (IT) complexity and total cost of ownership.

TOP Step Consulting was initially introduced to Progress Software to manage a Professional Services Automation (PSA) tool selection and global implementation project to support financial and resource management. TOP Step was chosen due to their experience in implementing PSA tools coupled with their understanding of the challenges a global company faces to effectively implement a PSA tool. This project started with the identification of the operational processes and data requirements needed for North America, EMEA, and Asia Pacific to deploy the base PSA system. NetSuite OpenAir, widely considered to be the leader in cloud-based PSA and in services resource planning software (SRP) was chosen, and the baseline implementation began.

As the project started, many changes were taking place at Progress Software and within the enterprise software industry. These included downturn of the economic climate and shift in how software is purchased -- with business decision-makers becoming more involved and looking for business solutions versus technical component purchasing by IT professionals. In order to meet their goal of helping enterprises achieve a higher level of business performance and operational responsiveness as well as become a leading enterprise software solution provider, Progress launched a completely new business solution called the Progress Responsive Business Process management suite.

## The Challenge

- Move from regional to global PS operations
- Standardize reporting business practices
- Strengthen delivery with Project Management tools and a set of core standard services
- Position company as a leading solutions provider



## ... in less than 6 months

In addition, Progress also brought in new professional services leadership that understood the challenging globalization issues and competitive nature of the enterprise software business. With the new Progress RPM™ solution launched, they needed to ready their professional services team for growth. The leadership team understood that before they could attain their goals, they needed to align their delivery operations, pull together collective service delivery knowledge and experience from around the world, and standardize on delivery methods in order to support growth and continue to deliver high-quality results to their customers.

One of the biggest issues facing the new PS leadership team was that each region, both nationally and internationally, was still doing business its own way, making it difficult – if not impossible - to report and capture accurate metrics quickly in order to monitor how the professional services business was doing.

### The Solution

During the Selection and Implementation project, TOP Step Consulting quickly demonstrated their expertise by successfully deploying the baseline PSA system. TOP Step understood that business leadership was needed for the PSA system to provide real benefits. As they moved into the business lead role on that project, TOP Step established best practices and demonstrated the need for global standards rather than country or regional business practices. These actions elevated them into becoming a trusted advisor.

Because of this trust, the strong results of the first project, and their ability to deliver, TOP Step Consulting was engaged to begin working with the Progress PS organization to implement the strategic vision for taking them to the next level. This “phase 2” project, internally termed “Ready-Set-Go”, had a strategic focus to globally align standards and processes to prepare the professional services organization for growth. This strategic initiative consisted of three key sub-projects:

- **Expansion of the initial Professional Services Automation project to align global processes and reflect these in the OpenAir system.** The development of a consistent standard would enable the visibility needed to manage the growing operations. Challenging issues included resource management, revenue recognition, organizational responsibilities, and increasing system adoption.
- **Implement a global Project Management Office (PMO) methodology.** This focused not only on consistent usage of PM methods, tools and templates, and knowledge management, but also on the processes for setting up, tracking and monitoring projects within the new PSA system.
- **Implement a Service Definition Framework (SDF) to define service offerings enabling consistency, repeatability, and high-quality delivery.** A framework was needed for defining and developing a service offering. The core offering that was developed would later be a part of the Progress RPM™ solution.

A plan was quickly put in place to implement each of these three sub-projects and TOP Step Consulting led the charge as an accepted extension of the Professional Services executive team. The cornerstone to keeping this project moving forward was the creation of both a stakeholder committee whose role was to keep all key stakeholders informed of project status as well as a project / management committee who could quickly resolve issues or make decisions needed to move forward.



“TOP Step Consulting was a driving force in helping us achieve our challenging globalization goals for Professional Services.”

– Kyle Bowker, Vice President and Managing Director, Americas

## Results

Within three months, all three initiatives (PSA, PMO, and SDF) had been addressed. Throughout the project, TOP Step worked jointly with the newly identified business leads at Progress, making the transition seamless as Progress began to work with the field teams to roll out the new processes.

The PS operational processes were aligned throughout the Americas, EMEA, Asia Pacific and Brazil. Each participating country now functions on a single reporting platform so that global representation, P&L reporting, and utilization analyses can take place. This was challenging because each country is unique in their cultural issues. By implementing consistent practices and processes, now each country operates globally from a reporting and management perspective, while keeping their local business culture in place to work successfully with customers.

The core Project Management process and structure was defined along with a training program to roll the methodology out to the field teams. The PM methodology has provided a standard platform for sharing project documentation, status, and overall project health.

A new Progress RPM™ suite service offering was developed leveraging the Service Definition Framework to create standard delivery plans, tools, and training, to support consistent and high-quality value to the customer. This new service jump-starts the initial Progress RPM™ suite implementation. As a result, customers appreciate and value the prescriptive approach and confidence the service team demonstrates in delivering the Progress RPM™ suite solution. This approach for creating and managing service offerings is now a hallmark of Progress PS.

## Experience

Progress’s success was enabled by establishing a strong and trusted relationship with TOP Step Consulting. Progress understands that a strategic business partner is better equipped to help drive the process because they are independent and can focus on achieving results quickly. The distractions of managing day-to-day operations of the business are a challenge in today’s constantly changing business environment. Focus and ability to drive the initiative is key.

Progress believes companies in similar situations to theirs may find working with an independent third party partner will help them through an evaluation and implementation process. Because of this project’s success, Progress found TOP Step to be an ideal partner who can help companies automate and re-engineer its operational processes to align with a new strategic vision.

Ideally, a company should understand what their business model is *before* they begin, and then secure tools that will aid in getting them to where they want to be. All too often organizations buy automation tools without understanding how to best customize and configure the tools to align with their business strategy. That’s where TOP Step can help. By working to develop an overarching plan they will accelerate getting you to your goal by putting tools and process in place that align with your business model and strategy.

Experience is also critical. Many organizations run into trouble translating strategic vision into operations reality. That’s why it’s important to have someone in your corner who has a focus on understanding your business practices first, so your company won’t have to rework what’s been done at a later date. As is usually the case, if you don’t have time to do it right the first time, you’ll need to find the time and money to redo it later.



# Tools, Operations, Process...

## Steps to business efficiency



### About TOP Step Consulting, LLC

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.

TOP Step Consulting, LLC  
43627 Oleary Lane  
South Riding, VA 20152

Phone: 703-999-4020  
Fax: 703-955-3525  
E-mail: [info@TOPStepConsulting.com](mailto:info@TOPStepConsulting.com)

Website: [www.TOPStepConsulting.com](http://www.TOPStepConsulting.com)  
Twitter: TOPStepTweets  
LinkedIn: [www.linkedin.com/company/top-step-consulting-llc](http://www.linkedin.com/company/top-step-consulting-llc)