



Business Efficiency Assessment

Design Your FinancialForce PSA To Work The Way You Do And Achieve Efficiency

- Do you have insight into your project profitability?**
- Are you struggling with sales and service alignment?**
- Are you struggling with adoption by your users?**

With a robust and highly configurable PSA tool like FinancialForce PSA it is key to design your system is designed to support the needs of your specific business model. This can pose a challenge to those



who do not have experience with PSA and the capabilities of FinancialForce PSA. At the same time, business operations experience is needed to understand how to configure the system to support your business model.

The TOP Step Consulting Business Efficiency Assessment is designed to identify where the gaps are between your business process and the FinancialForce PSA system configuration.

Our Professional Services Automation and business operations experienced consultants work closely with your team to fully understand your business model, what processes and tools are in place and how effective they are. At the end of this short two-week engagement, we provide you with recommended process and tools improvements along with the cost and benefit for implementing each change.

This valuable first step will arm you with the information to make the final decisions that will have the greatest impact towards achieving your goals.

Benefits of a Business Efficiency Assessment

- Independent review by PS business operations experts experienced in Professional Services Automation
- An actionable plan with cost/benefit for implementation
- Best practice discussions
- A FinancialForce PSA system that aligns with your business model

"TOP Step Consulting freed us up to focus on what we do best and on achieving our goals. There is great value in a long-term business relationship like the one we have."

- Jeff Herron, Vice President and founding member of Beaconfire



Our Process And What To Expect

Business Process Workshop

The Process Workshop provides a base understanding of your current business model. The focus is to capture how daily business operations are currently managed, understand the improvements or changes you plan to make and any known issues impacting your operations.

Operational Analysis

This phase entails:

- Identifying process changes that will be required to meet the business efficiency goals.
- Automation opportunities will be reviewed and a matrix developed, which can be used to evaluate potential system changes.
- Cost/Benefit for implementation of identified changes will be calculated providing critical data for implementation decisions and budget for the project.

Business Efficiency Action Plan and Recommendations

The final phase of the project is presentation of the findings and recommendations for improvement to your key stakeholders. We will review the findings and recommended plan in a face-to-face presentation. By using this collaborative approach we can receive feedback and validate any assumptions that may have been made during the identification process.

The final result is an actionable plan based on your goals and priorities for achieving your business efficiency goals.



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 professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research for a fifth consecutive year.

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