

Our FinancialForce PSA services are designed to help you every step of the way whether you are getting started or just need a helping hand to maintain your FinancialForce PSA system.



FinancialForce Business Efficiency Assessment

- Independent review by PS business process experts
- 2 day workshop to capture your daily business process, understand improvements planned and any known issues impacting your operations
- Identification of process changes required to meet business efficiency goals
- Evaluation matrix for automation opportunities and potential system changes.
- Presentation of the findings and recommendations for improvement to key stakeholders.
- Development of actionable plan with cost/benefit for implementation based on feedback and findings
- Best practice discussions
- A plan for your FinancialForce PSA system that aligns with your business model



FinancialForce PSA Implementation

- Proven implementation blueprint for local and global deployments
- Business process workshop to review opportunity management, client management, project management, resources management, financial management and reporting
- Identification of FinancialForce PSA modules relevant for your business
- Integration review to understand who is responsible for information exchanges, what is needed, and when is the information required
- System validation to review feature/field permissions based on types of resources to ensure compliance to business processes
- Data migration - identify historical and current data to load into the system then develop the data migration plan
- Customized user training specific to needs
- Go live and month end verification



FinancialForce Revenue Management Implementation

- A proven revenue recognition best practice implementation blueprint
- Cross-functional process review with PS and Financial teams to define requirements
- Develop endless revenue recognition templates to be applied to different scenarios based on complex contract or data requirements
- Integration review to understand who is responsible for information exchanges, what is needed, and when is the information required
- System validation to review and refine feature/field permissions to ensure compliance to business processes
- Data migration to identify historical and current data to load into the system then develop the data migration plan
- Customized user training specific to needs
- Go live and month end verification



FinancialForce Virtual Administration

- Tailored set of services to fill the gaps in your Salesforce administrators' knowledge and availability
- Access to knowledgeable FinancialForce PSA experts who understand your business
- Recommendations for improvements based on your unique business process and system configuration
- Implement updates and configuration changes as needed
- Proactive system audits to ensure data accuracy and user adoption
- Assistance with creating or modifying reports
- Coordination with your Salesforce administrator on FinancialForce PSA release features
- End user support for frequently asked questions



... “our success is not just with the FinancialForce software, but with the capability of TOP Step Consulting who helped us implement it” – AppDynamics



FinancialForce Integrations & System Expansion

- Integrate FinancialForce with other financial, customer support, and engineering systems outside the Force.com platform
- Experienced in top integration tools such as Dell Boomi and Jitterbit
- Expand the use of the system with custom features such as:
 - Project dashboards and status reports using Visualforce pages and Output Builder
 - Prepaid draw downs on fixed fee projects using custom objects and triggers
 - Revenue Management for the entire organization using complex sales orders

STEPS to Business Efficiency



STEPS is our comprehensive set of services focused on improving your professional services business efficiency and productivity.

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 seventh consecutive year and be ranked as one of the fastest growing private companies by Inc. 5000.



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