



FinancialForce PSA Implementation

Aligning Your Business Process To Your PSA Will Ensure A Successful Implementation

So you have decided to implement FinancialForce PSA, now how do you insure a successful and smooth implementation?

Making the decision to use a PSA tool to gain visibility and control for your project-based business is only the first step. Implementation of a PSA requires an understanding of your Operational and Business Model to ensure user adoption, efficient system use, and accurate information tracking and reporting. If you are a global operation your implementation must also be able to accommodate expansion to other countries and offices without impacting defined processes or data capture.

TOP Step Consulting has extensive experience in deploying PSA tools both locally and globally. Our consultants come from industries that leverage PSA tools and have gained their experience through practical application, trial and error, and vendor interaction. We understand your business problems and processes/policies along with having a unique skill in interpreting your terminology into the FinancialForce PSA product terminology. This bridges the communication gap that often times results in frustration and deployment milestone slips simply due to misunderstanding.

TOP Step Consulting's methodology for FinancialForce PSA Implementation has been refined and perfected through extensive real-world deployments. This, in combination with our FinancialForce PSA know-how and our business operations experience we are 100% confident we can help you begin receiving value in your FinancialForce PSA investment faster, and achieve a higher satisfaction and adoption of your new system.

Benefits of FinancialForce PSA Implementation Services

- Get FinancialForce PSA Experts who have business operations experience
- A proven implementation blueprint that works for both local as well as global deployments
- Best practice discussions
- User training to ensure successful transition from legacy system to the FinancialForce PSA system
- A FinancialForce PSA system that works the way you do

“TOP Step’s expertise in guiding us through this journey and helping us avoid mistakes that would have set us behind, was one that was appreciated by our entire team at Resource and one that was well worth the investment.”

– Drew Sheppard, Executive Director of Operations, Resource



Our Process And What To Expect

Business Process Workshop

We focus on how you want to run the business before we recommend FinancialForce PSA configurations, customizations, and usage. We will explore:

- Opportunity Management
- Client Management
- Project Management
- Resource Management
- Financial Management
- Current reports used within the organization

Detailed Design/Module Configuration

This will cover

- Identification of FinancialForce PSA modules relevant for your business
- Reporting needs and report definition

Integration Review

We understand who is responsible for information exchanges, what is needed, and when is the information required.

System Validation

We conduct a trial run to walk-through realistic system use scenarios. The benefit of this walk-through is to identify any cumbersome business processes and refine feature/field permissions based on types of resources to ensure compliance to business processes.

Data Migration

We identify historical and current data to load into the system then develop the data migration plan.

Training

Training may take the form of classroom, user guides, webinars, or email instructions depending upon the number of users, and what is best suited for your organization. Included are Time and Expense users, Project Managers, Finance, and an overall System Administrator.

Go Live and Verification of Month-End

We work closely with your team to conduct a go-live parallel run with your current system is conducted to allow a verification activity (usually month-end activities) before final cut-over to FinancialForce PSA from the legacy system.



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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