



QuickArrow to OpenAir Tool Migration

What is your plan for migration to OpenAir?

Migrating from one automation tool to another can be a daunting task. We understand a PSA tool migration is much more than a software migration.

TOP Step Consulting, a leader in PSA tool expertise, will make the migration painless. We provide you with a full lifecycle process focused on your business process to assure you get the most benefit possible with your new automation tool.

We will guide you through your migration to minimize the impact to your business operations. At the same time, we will evaluate and provide recommendations to enhance your business process to take advantage of new automation capabilities which will improve efficiencies and ultimately increase your bottom line.



Benefits of an OpenAir Migration

**Minimize disruption of
critical day-to-day
operations**

**Experience and Best
Practice knowledge
transfer focused on your
unique business**

**Recommendations for
streamlining your
business processes**

**Adoption program to
ensure your success with
the new automation tool**



PSA Tool Migration Process

Stage 1: Business Process Workshop

Top Step's PSA Tool Migration begins with a Business Process Modeling Workshop. The Process Workshop provides a base understanding of your current business model and usage of your current PSA tool. We focus on how you want to run your business before we recommend configurations and usage of the new tool.

The result of the workshop will be a Migration Plan including:

- ◆ Business Process Model
- ◆ Recommended process changes
- ◆ Tool configuration requirements
- ◆ High-Level Project Plan

Stage 2: Tool Migration

The tool migration stage consists of 4 key phases:

- ◆ Tool setup and configuration
- ◆ Data migration and validation
- ◆ Business report setup and validation
- ◆ System and user testing

Throughout this process we work with your staff providing best practice and guidance.

Stage 3: Training and User Adoption

We understand user adoption is critical to success and a large factor or any time there is change.

After the system has been thoroughly tested, TOP Step will work with you to document the system configuration and processes.

To ensure you have continued success with your new system, we will work with your team to develop a training plan and a set of recommendations for monitoring user adoption.

Who should be a part of your migration team?

System Administrators

Business Analyst

Project Managers

Resource Managers

Operational Managers

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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