



How To Lower Your Cost of PSA Tool Administration



TOP Step Consulting LLC
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If you could lower your Professional Services Automation Tool administrative cost, would you do it? This paper will introduce you to best practices to improve your systems administration, lower your costs, and provide a greater ROI on your PSA tool.

A Day in the Life

OpenAir has brought a great deal of benefit to your organization including automating your billing and invoicing process, decreasing non-billable bench-time, handling profitability reporting, and optimizing revenue, just to name a few.

While there are a number of benefits, your SaaS PSA tool has also introduced a different set of challenges. We find that most organizations that utilize a Software as a Service (SaaS) PSA tool are currently failing to keep good documentation about their system configuration, to learn the new or improved capabilities of each software release, and to apply enhancements that will benefit their business operations. Solving these new challenges allows organizations to become more efficient and to continue achieving return on investment from the PSA tool.

Let's take a look at a day in the life of a system administrator and see if this story rings true in your organization. It's that time again. You've gotten a notification about a new release of features available for your SaaS PSA Tool. You make yourself a note to look into it later and proceed to create your weekly reports for management that seem to be taking longer and longer these days to produce. The recent acquisition added a lot of employees into the system so your report consolidation process that was put in place when the PSA system was initially set up is becoming painful. Last week it took almost 3 days to create and produce the reports to also include charts. You notice as you are working in the system the new release has had no impact, everything is working just as before, and nothing is different - Why fix what isn't broken? When the reports are finished, you address the numerous end user complaints such as "why do I see stuff that I don't care about?", "I don't like having to fill in fields that don't relate to me or my group" and, "Can't we ask for an enhancement to do this?" You answer the easy questions but some requests are harder or will take longer to research so you answer, "It's just the way

the system works". You don't have time to learn more about your system or the new features because you're getting high priority requests from management for reports and finding that data is not clean in the system, which causes you to spend most of your time following up with people or fixing things yourself. When you leave at the end of the day, you notice the yellow sticky with the words "read about the released features" and sigh knowing it will have to wait for tomorrow, which turns into next week. When the release features are finally reviewed you discover that an enhancement related to the export function would have saved you days of manual aggregation!

Does this scenario sound too close to reality to you? That's because this is becoming the normal cycle of life for many users of SaaS PSA tool systems such as OpenAir. While many reasons for this reality are related to the new system administration challenges and ownership of a SaaS PSA tool, the primary reasons are lack of *time* and *knowledge*. Your system administrators may have been trained in how to use the system and troubleshoot end-user issues related to using the system, but they probably haven't had the time to learn the entire system and understand either features that are not being leveraged or improved options for features your organization currently has in place. This presents risk to the organizations caught in this reality. Your return on investment in the PSA tool diminishes, which results in decreased value to your business over time.

One of the great benefits of cloud computing is continual improvement and addition of new capabilities. The SaaS PSA vendors understand that your business is continually changing, and to support you, they are constantly adding new capabilities and features to support these changes. This is all done without interrupting your service. New and enhanced features are often overlooked because you don't see them unless you make a decision to switch them on and configure them to work within your business. Having worked with the OpenAir system for many years, I applaud their conviction to a 'no end-user impact' slogan demonstrated each time a release is completed, which can occur up to eight times in a single year! With such a great upside, how can there be a downside? Since the system doesn't act or look any different after a release, system administrators are not necessarily looking for system enhancements or administrative efficiencies that would save them time.

Why Release Management Becomes a Low or No-Priority Activity

There are a number of reasons why release management becomes a low or no priority activity for system administrators. First and foremost is time and system knowledge. Your system administrators may have been trained in how to use the system and troubleshoot end-user issues related to using the system, but have they had the opportunity to learn the complete system and understand either features that are not being leveraged or improved options for features that are currently in place? There are certainly challenges in addressing administration and system

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management, but it does have its rewards. The system administration effort, including release management, can be a good place to “win the hearts and minds” of your company. With a solid system administration function that serves the needs of the business through the use of the system, the company can increase the probability of meeting business requirements and achieving ROI. Adoption and use of any system is higher and much more effective if the end users are part of the team defining the system and the processes. Your system administrator should involve feedback

channels that allow them to be aware of end user needs, complaints, and requests. Acting on those requests and collaborating with the users of the tool builds a team mentality, instills ownership in the results, and avoids the impression of a dictatorship. If you asked your local grocery store to stock a certain brand, and they gave you a pleasant smile with a promise to look into it and three months later nothing has been done, would you bother asking again? Would you change grocery stores? Now think about your attitude if within two weeks you saw they were stocking the item you requested. You get a sense of being listened to and respected. This is human nature.

Some organizations have not yet staffed their PSA tool teams. So the question, “Do you even have a system administrator?”, may be the place to start. This doesn't need to be a full time person but it does certainly need to be someone who understands your business model and **why** you are using a PSA Tool, not just **how** you are using it. This typically is best filled by a person on the business side or a business analyst within your IT organization. Many companies naturally think of system administration as being the responsibility of the IT department. This is why I believe many IT departments now staff business analyst roles to bridge the gap between technical support and business process knowledge. Investing in the

systems administration area, either internally or externally, is a sound business decision.

7 Keys to Improving the Value of Your PSA Tool and Managing Your Costs

To better achieve the greatest use and to realize the value of your SaaS PSA Tool, we have identified the following 7 key best practices. These best practices should be used in conjunction with the use and administration of your system and are similar to other project and process lifecycles.

1. **Business Knowledge - Understand Your Business Model and Business Requirements.** The ability to relate the PSA tool's use and deployment directly back to the business requirements and goals is critical to making sound decisions regarding administrative functions. With this understanding, the System Administrator will be able to establish the priorities and strategies for the tool, which will deliver the greatest business benefit.
2. **System Knowledge - System Administration Training On All Features and Functions Available.** System administrators should be trained on all features and functions on your PSA Tool. This includes both features you utilize as well as those you may not. This type of training goes beyond training for your specific uses and configuration and provides an understanding of the intended use and benefit of all the features available in the tool. Without this type of training, your system administrator may struggle to understand how features work together and the potential impact to your established business process that turning on a new feature may have.
3. **Institutional Knowledge - Document Your System.** A best practice is to document the system. Taking the time to document your system configuration and business model is essential to release management, as you need reference materials to understand what new features and functions may be relevant to your use of the system. Since no code development cycle was required to deploy your SaaS software, the normal process of documenting requirements and formalizing design documents may have been skipped or skimped. If you don't have complete system documentation, prioritize getting it in place.
4. **Release Knowledge - Set Time Aside To Understand Each Release.** As the vendor delivers release notes for each new feature or enhancement, your system

administrator should review them against the documented system configuration and business model for any overlaps. Any overlaps deserve further investigation.

5. **System Usage Knowledge - Make Your System Administrator A Part of the Help Desk Function.**

Ideally your system administrator is part of a help desk function or another direct feedback channel so they become aware of end-user needs, problems, and requests. If you are instead relying completely on the vendor's support team to handle end-user requests, you are losing valuable insight into how your team is adopting and using the system. Your system administrator may be aware of the oh-too-close-to-reality situation described earlier where resources are spending more effort on producing reports and tracking data than you would like. Even an outsourced administrator option could be effective in this position, as they will be more focused on your business model than the software vendor, who is focused on, you guessed it, their software. For example, the inefficient report creation process mentioned above would be tracked as an enhancement request for the PSA tool vendor to deliver at some future time. By maintaining an issue and enhancement list, your system administrator can easily review it against each new software release for high priority features or enhancements that would better support your business model.

Manage your enhancement requests to support your business needs through your System Administrator.

6. **Impact Knowledge - Test for Impact and Cost Savings.** The vendor has the responsibility to ensure that each feature is compatible with your system. Your responsibility is to evaluate and determine if each new or improved feature: 1) is appropriate in your environment, 2) will be disruptive or beneficial, 3) will solve any existing problem or ineffective use of the system and, 4) will work the way you expect. Therefore, it is always a good idea to do some testing. A best practice is to create a set of common test cases that would exercise the new feature, and determine if the current process is impacted and if there would be a need for any user training. The testing doesn't need to be extensive and probably can be accomplished in four hours or less depending on the extent of the change. Almost all SaaS vendors provide the option to have test copies of your production system just for this purpose. Ask for a test copy, and then try out the features. Some features may need to be activated by the vendor support team, and your system administrator may be able to activate others directly. Imagine four hours of labor cost that could give back a day or even a week of

productive time due to improving key processes in your organization; an easy ROI, – wouldn't you agree?.

7. **Communicate, and then Change** - Change control is a process, not a technical function. Change is more readily adopted when you plan things out and communicate to your end users what changes will be made and the benefits of the changes. Before activating or deploying any system changes, set up a date and/or timeslot for the changes to take effect. Establish this maintenance window and communicate to your end-users clearly about the possibility of system changes occurring if they use the system during the maintenance window. Applying a good communication process that provides the ability to learn about the changes fosters a team attitude, which alone may make your end users adopt the system more quickly and be more compliant with defined processes. Communicate what is changing in the system, how it is changing, and any impact to the end users. Consider using a visual tool such as PowerPoint, or even better a short video to help your organization understand the changes and benefits. Most system administrators tend to be feature-focused, but it is important to remember that you must promote benefits, not just features!

If you could reduce your administrative costs for your PSA tool would you do it?

The whole process of release management may take as little as four to eight hours per release and can result in tremendous benefits and cost savings for your end users and your system administrator. The keys to making this possible are ensuring knowledge of your business model, good system documentation, and staying abreast of the most current system capabilities.

Here are a few examples of how following a good release management process can quickly improve the value you receive from your PSA tool:

- Using the example at the beginning of this paper, with release management and adopting a single new feature, the person responsible for creating the reports could have been reduced their time to consolidate reports from 3 days to 10 minutes.
- Timesheet compliance is often problematic, requiring management and system administrators to follow up with individuals by email or phone. A single release announcing support for mobile devices could remove common excuses for

timesheet non-compliance such as not having internet access at the customer site or while traveling, not having laptop access, or other excuses. Timesheet compliance often increases 75%, reducing the time required to follow-up with non-compliant users and shortening month end invoicing cycles by one to two days.

- Implementing organizational changes, which may happen each year (or even quarter), may take up to 10 days to reassign projects, update data views by region, and make other modifications to meet reporting needs. A recent release includes a new feature that removes much of the administration required to change data views quickly. The result? No more hard coding of access is required, and projects are related to people based on the organization they are assigned to. With your 1000 projects, organizational changes have just been reduced to 3 days with minimal impact to user records.

If you could lower your PSA Tool administrative cost, would you do it?

Check out if outsourced administration is right for you by using the TOP Step Consulting cost savings calculator at www.TOPStepConsulting.com/Answers

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.

TOP Step Consulting offers services through our **STEPwise** program to train your administration staff, act as your in-house administrator, or provide you with Release Management services. We provide you with the value of understanding your specific system configuration, maintaining your system documentation, and acting as your advocate for needed enhancements to support your business. We evaluate every release and test to ensure we understand the benefits and capabilities of the newly released features and advise you on what features will benefit your business. We have a deep expertise which we pass on to you through our experience and best practices we capture from our quickly growing customer base from both small organizations to large global operations.

Visit our website for more information on our **STEPwise** program and Performance Monitoring services at www.TOPStepConsulting.com/Answers

To contact TOP Step Consulting directly

Email: Info@TopStepConsulting.com

Phone: 703.999.4020