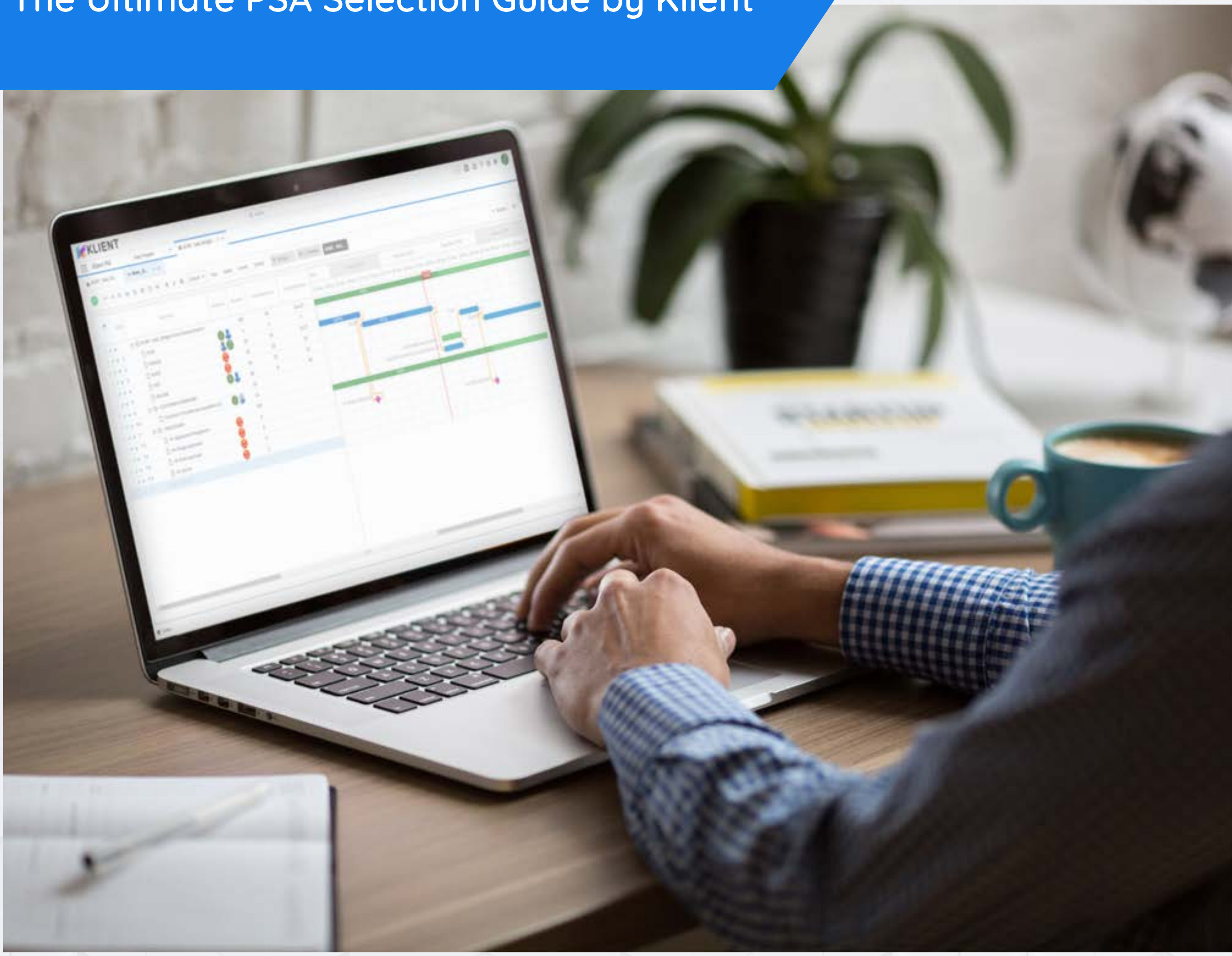
How to Choose Your Growth Platform

The Ultimate PSA Selection Guide by Klient



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Why We've Created This Guide

Have you hit a ceiling in your growth?

Every SaaS gets to this stage. This is often caused by a lack of clarity and visibility, which can occur when working with data scattered across a bloated tech stack. It's time to ditch those disconnected tools and streamline your business with a PSA.

With a PSA, you can reduce your go-live time, sell more licenses, and redirect your focus to innovation. In other words, you can achieve hassle-free operations.

Yet, searching for "PSA" on Google can be overwhelming and put you in analysis paralysis. It's a crucial business decision, and investing in the wrong software can lead to catastrophic results.

Don't sweat it; we've got you covered! This guide will assist you in finding the ideal PSA solution for your SaaS business.

Use this guide and checklist to clarify your business needs. It's your first step towards successful software evaluation and onboarding.

Let's get started!

BANT (Budget, Authority, Need, Timeline)

1. Every software supplier will ask you these questions

BANT is a standard sales qualification questionnaire. Pretty much all sales reps will ask you these questions to qualify your request for a demo. As such, **make sure to prepare your answers to save time during the evaluation process.**

1.1 Why do you want to change now? What is your priority?

This is the most important question in this checklist. What's your priority? This should be your end goal and you should not get lost in shiny/nice-to-have elements.

- ☐ Moving away from Excel and our homemade/manual files.
- ☐ Replacing our Frankenstein interconnected/unconnected system.
- ☐ Stopping customer churn hemorrhage and staying away from red accounts.
- ☐ Having clear visibility of project reliability, planning, and schedule.
- ☐ Improving my project success with the right budget and timeline.
- ☐ Working like a top firm and increasing our business EBITDA.
- ☐ Other:

1. 2 Why would you stay with your current setup?

About 45% of software searches abort within 3 months for multiple reasons. These are the most frequent reasons your quest might stop.

- [ ] We don’t know what we want or need.
- [ ] We don’t see the urgency or the extra value in changing our system.
- [ ] We are afraid of change management requirements.
- [ ] We are comfortable with our current system.
- [ ] We are looking for a solution that works 100% our way.
- [ ] It’s not a business priority.
- [ ] We don’t have a budget or timeline for this project.
- [ ] Other:

1.3 Is this a universal need/priority on the team?

○ Yes ○ No

1.4 Do you know what a PSA (Professional Service Automation) platform is?

○ Yes, that’s what I’m looking for.
○ No, but I want to learn.
○ A what?

1.5 Is it the first time your business is evaluating this kind of system?

○ Yes, this is the first time.
○ We’ve looked during the last year.
○ We do this every year :(and we never change.

1.6 What is your role in this process?

- ☐ You are in charge of pre-qualifying solutions before committee approval.
- ☐ You love our solution and think it would be the best for your company.
- ☐ You are part/lead of the final decision committee that will pick the solution.
- ☐ You give the Financial Stamp on the project.
- ☐ You have set this as a top priority and are held accountable for its success.

1.7 Who is part of your decision-making committee?

☐ CEO/President ☐ CFO/Finance VP ☐ COO/Professional Services VP

☐ Head of Professional Services ☐ Head of Customer Service ☐ Head of IT

☐ Salesforce Lead ☐ Project Manager ☐ Developer

☐ Others: __________

1.8 What is your timeline for your project to begin?

... select timeframe

1.9 What is your timeline for your project to be completed?

... select timeframe

1.10 What percentages of your company will need to have project visibility?

- ○ 100%
- ○ 75% to 100%
- ○ 50% to 75%
- ○ 25% to 50%
- ○ Less than 25%
- ○ I don't know yet

1.11 How many departments will be involved in this project?

... select a number

1.12 What is your license budget?

... select a price range

1.13 What is your Implementation / Advisory Services Budget?

... select your budget

Functionality Checklist

This functionality checklist is based on real customer use cases and requests. But we've kept it to the most vital elements so you don't get overwhelmed.

Keep in mind that the functionalities you'll need will depend on the priorities you set up. It's easy to get lost in all use cases if you haven't defined those priorities yet.

Ask yourself:

→ What are your most urgent needs at the moment?
→ What should you focus on?

Any demo you book should be about identifying how the software will help you solve your challenges.

First: Pick the top 2 use cases that are your biggest challenges.

- [ ] Project Estimate & Sales Forecast
- [ ] Project Management
- [ ] Resource Management
- [ ] Timesheet & Expense
- [ ] Customer Experience & Collaboration
- [ ] Billing & Invoicing

2. Forecast Future Sales with Accuracy & Speed Up Your Sales Process

There are two goals that most SaaS teams want to achieve with their sales cycle besides closing the deal:

→ **First,** to get visibility on pipeline projects to prepare the required resources for the upcoming implementations.

→ **Second,** to improve the sales cycle speed by standardizing project estimations and the quoting process.

The above is possible when there's close collaboration between the sales and delivery teams. This **Project Estimates & Sales Forecast Checklist** contains all the features that a Sales team needs to achieve this.

Select the functionalities required for your success.

2.1 Do you want to forecast implementation services revenues and forecast the availability of your resources?

○ Yes ○ No

2.2 Are you looking for one unified platform for your sales team to have visibility on projects?

○ Yes ○ No ○ How is it possible?!

2.3 What should your Sales team have visibility on?

- [ ] Account Information
- [ ] Contact Information
- [ ] Previous/Current Projects
- [ ] Projects Details
- [ ] Document Management
- [ ] Email/Activities Tracking

2.4 Where does your Sales team need to be more efficient?

- ☐ Proposal Project Template
- ☐ Quote Quick Create
- ☐ Proposal Document Generation
- ☐ Accurate Estimates
- ☐ Proposal Quick Create
- ☐ Pipeline Project Management
- ☐ Kickoff & Go-Live Date accuracy

2.5 Are forecasting pipeline projects and resource requirements a challenge for your team?

◯ Yes ◯ No

2.6 How do you want to integrate with your CRM Software?

... Select integration method

2.7 Others/Comments:

3. Never Miss a Deadline, Stay Within Budget & Evolve Your Project As You Go

Most services teams within SaaS businesses want to be more efficient with project delivery so they can sell more SaaS licenses.

Yet project management is rarely the issue.

First comes client expectations. You promise a specific budget and timeline to customers. Your customers want to feel like any risks to that promise are managed — or that they at least have transparency and visibility on what's going on, including when and why issues arise. So how can you provide this visibility to customers in a predictive way?

The second challenge is your ability to optimize/forecast your team's schedule. Understanding skills, characteristics, and proficiencies is essential to optimizing your schedule and assigning the right person to the project.

The **Project & Resources Management Checklist** below contains all the requirements or use cases that a professional services team in a SaaS company could ever dream of to achieve all of the above.

Select the functionalities required for your success.

3.1 What are your Project Management Styles?

- [ ] Agile Management
- [ ] Waterfall Management
- [ ] Scrum Management
- [ ] Kanban Management
- [ ] Lean Management
- [ ] Checklist & todos
- [ ] Post-Its on the wall.

3.2 What type of project do you want to track?

Billable Projects

- ☐ Milestone based Project
- ☐ Time & Expense Project
- ☐ Mixed T&E & Milestone Project
- ☐ Managed Services (Recurring, Retainer, Overage)

SaaS Project

- ☐ Initial Customer Onboarding
- ☐ Support Projects
- ☐ University Training
- ☐ Custom Implementation

Internal Structuring Projects

- ☐ HR Projects (ex: Employee Qualification, Onboarding, Offboarding)
- ☐ Objectives & Key Results (Business/Individual Quarterly OKR Performance Tracking Projects)
- ☐ IT Compliance Control Projects (SOC 2, IT GRC & Control Matrix Framework)

3.3 How do you track your time?

- ☐ On Projects: Monthly
- ☐ On Tasks: Weekly
- ☐ On Customer-Facing: Time Daily
- ☐ With Mobile Phone

3.4 Does your team track a full timesheet?

- ○ Only billable hours
- ○ Only utilizable hours
- ○ All hours are tracked (billable & non-billable)

3.5 Do you have approvals on the timesheet?

○ Yes ○ Yes, with a Multi-Level Approbation ○ No

3.6 Do you repeat your successes and learn from your mistakes?

- [ ] Yes, we do follow a methodology.
- [ ] Our delivery methodology is structured with Project and Task templates.
- [ ] We do Lessons Learned/Post-Mortem sessions after project completion.
- [ ] I wish I could say yes to the above.
- [ ] Every team manages their projects in the way they deem best.

3.7 What type of details do you manage on your projects?

- [ ] Parent and Child Project
- [ ] Tasks and Milestone
- [ ] Resources and Roles
- [ ] Rates per Resources and Roles
- [ ] Time entry and budget
- [ ] Risks & Issues
- [ ] Status Tracking
- [ ] Customer Project Status
- [ ] Internal Notes/Communications
- [ ] External Communications

3.8 What do you need to manage and schedule in your project resources?

- [ ] Time Tracking
- [ ] Expense Tracking
- [ ] Milestone Tracking
- [ ] Resources Database
- [ ] Skills, Abilities & Ratings
- [ ] Resource Utilization
- [ ] Resources Placeholder by Role
- [ ] Resource Comparison
- [ ] Resource Scheduling
- [ ] Resource Search/Filtering
- [ ] Resource Availability

3.9 How do you want to track and manage your projects?

- [ ] Project Maintenance
- [ ] Activity/Task Tracking
- [ ] Progression Tracking
- [ ] Weekly/Monthly Project Status Generation
- [ ] Communication Tracking
- [ ] Internal Communication

3.10 Others/Comments:

4. Ensure Customer Satisfaction & Solve Potential Issues

Achieving customer success is all about bridging the gap between expectations and results.

While several functions of Customer Satisfaction were covered in the above sections, such as customer visibility, you also need to detect which projects aren't going well. When that's possible, you can intervene in the right way with a personalized touch.

Often, the main cause of customer dissatisfaction is a gap in the process, which is often seen with teams relying on multiple platforms. When this happens, Customer Success teams don't have the sales and project data required to know what's happening with their customers (and thus prevent churn).

But they're also missing automatic fail-safes to find those unsatisfied customers. Most customers will communicate their dissatisfaction to one or multiple employees before churning, but if you miss those signals, you may not be able to save the relationship.

Below is a Customer Success Checklist to help you ensure customer satisfaction and fix issues proactively.

Select the functionalities required for your success.

4.1 Are you looking for one unified platform for your customer success team to have visibility on projects?

○ Yes ○ No

4.2 How do you want to collaborate with your customer on projects?

- ☐ Customer Portal
- ☐ Customer Tasks
- ☐ Customer Communities
- ☐ Customer Project Visibility
- ☐ Customer Access

4.3 What does your Customer Success team need to have visibility on?

- [ ] Account Management
- [ ] Customer Card
- [ ] Customer Activities
- [ ] Project Details
- [ ] Sales Details
- [ ] Alerts and notifications

4.4 What type of customer surveys are you looking for?

- [ ] Automatic
- [ ] Manual
- [ ] We don’t need them

4.5 Other/Comments:

5. Stop Revenue Leakage and Scale Faster

Profiting is important. We all know that. And to get more of it and stop revenue leakage, it helps to have one tool that can access all the data you need for your reporting.

A PSA platform that's perfect for you should have all the data requirements to be able to generate all the reports you could ever dream of, such as generating forecasted utilization by resources and roles. At best, it should allow you to do all that without overloading your team with data entry tasks.

Below is a Finances & Reporting Checklist to help you achieve this goal.

Select the functionalities required for your success.

5.1 How do you invoice your projects?

- ☐ Upfront
- ☐ Installments
- ☐ % Prepayment
- ☐ Hours Incurred

5.2 What do you need in terms of Time Tracking?

- ☐ Time Tracking by Client
- ☐ Time Tracking by Project
- ☐ Time Tracking by Task
- ☐ Timesheet Management
- ☐ Vacation/Leave Tracking
- ☐ Billable and Non-Billable Hours
- ☐ Expense Management
- ☐ Activity Tracking
- ☐ Billable Hours Tracking
- ☐ Billable Rate Management
- ☐ Multiple Billing Rates

5.3 What type of reports do you want to generate?

- ☐ Project Budgeting
- ☐ Project Financial Report
- ☐ Financial Reporting
- ☐ Historical Utilization Rate
- ☐ Forecasted Utilization by Resources & Roles
- ☐ Other: ____________________

5.4 What do you need in terms of invoicing?

- ☐ Tracking Prepayment
- ☐ Tracking Revenue Recognition (ex: ASC 606)
- ☐ Invoice Creation with Detailed Lines
- ☐ Creation of an invoice PDF to send to your customer
- ☐ Synching the invoice to the Accounting Software
- ☐ Tracking the payment of these invoices in the PSA

5.5 How do you want to manage your reporting needs?

- ☐ Prebuilt Reports
- ☐ Prebuilt Graphs
- ☐ Prebuilt Dashboard
- ☐ Custom Charts
- ☐ Custom Reports
- ☐ Custom Dashboard
- ☐ Third-Party BI tool integration

6. IT & Non-Functional Checklist

A lot of thought leaders talk about achieving a "unified platform for business management".

In professional services for SaaS, your sales, customer success, marketing, and delivery team need to share data. And choosing a tool that allows these teams to share this data with a single source of truth can be a challenge. On the other hand, having a single platform also means you don't have to manage security and access on 10 separate platforms!

The biggest challenge is finding a tool that fits those requirements, but that can also adapt and evolve as your business grows. Ask yourself the following questions to discover your needs.

6.1 Which non-functional characteristics are important for your organization?

- [ ] User Interface
- [ ] Multi-language
- [ ] Brand the Application
- [ ] Search Function
- [ ] Ease of Use

6.2 What are your needs in terms of Out-Of-The-Box and Customizable features for the platform?

- [ ] 100% Functional Out-Of-The-Box Version
- [ ] Customizable Settings for the Organization
- [ ] Individual Customizable Settings
- [ ] User Experience per Role/Department
- [ ] Customizable URL
- [ ] Workflow and Automation

6.3 What are your requirements in terms of performance management?

- [ ] Response Time
- [ ] Data Centers nearby
- [ ] Speed and Latency Monitoring
- [ ] Ability to Scale
- [ ] Reliability & Availability

6.4 What are your requirements for the platform and its management?

- ☐ Cloud-Based
- ☐ Test and Development Environment
- ☐ Mobile Version
- ☐ Application Roadmap
- ☐ App. Version Updates

6.5 Are you currently using third-party software to manage part of your needs?

○ Yes ○ No

6.6 If yes, are you willing to replace it?

○ Yes, of course ○ No, Integrate it ○ No, keep it external.

6.7 Which type of software do you want to integrate (and explain the application and integration flow)?

☐ HR Management Software:

☐ Timesheet Software:

☐ Accounting Software:

☐ Project Management Software:

☐ CRM Software:

☐ Other API Integration:

☐ Office 365 or Google Suite Integration:

6.8 Are you currently using Jira for Task Assignments?

◯ Yes, we love it! ◯ Yeah, but open to new option ◯ No

6.9 Are you currently using Salesforce?

◯ Yes ◯ No

6.10 Is being built on the Salesforce Platform a Value-Add?

◯ Yes ◯ No

6.11 What are your security requirements?

- ☐ Roles & Permissions
- ☐ Field Level Security
- ☐ SOC 2 Compliance
- ☐ Audit Trail
- ☐ Backup

6.12 What are your compliance requirements?

- ☐ Access to Customer Information
- ☐ Personal Data Management
- ☐ Secure Data Deletion Routine
- ☐ Data Sharing
- ☐ GDPR

7. Software & Advisory Services

Tools are just tools. It's what you do with the tool that matters.

The tool should help you achieve more than what you're doing right now. That's where Implementation Services and Onboarding come into play.

Use the two questions below to clarify whether you need Implementation Services, Onboarding Services, both, or other options.

7.1 What type of Implementation Services are you looking for?

- ☐ Self-Implementation (Videos & Self-Training)
- ☐ Advisory Services
- ☐ Standard Training
- ☐ Success Warranty
- ☐ Onboarding Services

7.2 What are your requirements for customer support?

- ☐ Support Services
- ☐ Email
- ☐ Customer Community
- ☐ Chat
- ☐ Help Desk
- ☐ Documentation
- ☐ Phone
- ☐ Searchable Documents
- ☐ Videos

Congratulations!

You're Ready To Transform Your Business With a PSA!

Now you have a full picture of what your business and teams need to thrive and grow. As a result, we hope you are now well-prepared with complete clarity on what to look for in a PSA.

The fun part starts here — time to evaluate your options. To make an educated decision and present an empowering tool to your stakeholders; you should be able to say "yes" to the following questions:

1. Is every feature available on a single platform within a single source of truth?
2. Will this platform give us a scalable foundation for growth?
3. Will the team building the software help us achieve even our most ambitious business?

Then you'll have what you need to make an educated decision and present the tool to your stakeholders. You'll be ready to streamline business operations, onboard customers faster, sell more licenses, and increase customer retention.

Choose wisely!
Your business dream could come true.

Julian Ricciardi
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If you have any questions navigating this checklist, feel free to contact me at:

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About Klient

Klient PSA is an all-in-one professional services automation platform. It's designed to simplify operations and drive growth for professional services businesses and SaaS companies. Built on Salesforce, it offers efficient project management, seamless collaboration, and real-time insights to make informed decisions.

With Klient PSA, you can streamline processes, optimize team performance, and unlock your business's true potential. Say goodbye to scattered data and inefficiency. Instead, embrace a unified platform that empowers you to thrive.

Run a hassle-free business

Klient combines all the features you need on a single platform - Salesforce licenses included!

Estimate & Forecast
Create complete project estimates that drive your forecast.

Delivery & Execution
Unlock your team's potential to maximize productivity.

Project Management
Optimize project planning to execute on time.

Customer Experience
Collaborate and gain insights to drive customer satisfaction.

Resource Management
Increase your utilization while predicting peaks and valleys.

Billing & Invoicing
Invoice faster to save time and unravel money

Experience the transformative impact of Klient PSA and propel your business forward.

Start Your Free Klient Trial Today at klient.com