Salesforce Labs Professional Services Automation is a resource driven approach to managing the lifecycle of a project delivery process.

Common business goals in services divisions

1. Increase the repeatability of projects
2. Manage resource capacity
3. Decrease the time to bill
4. Reduce disparate systems and processes
5. Consolidate knowledge and best practices
6. Set the proper expectations to projects and resource commitments
7. Reduce rework time
8. Improve consulting performance
9. Understand "whose on the bench"
10. Decrease consultant turnover

The intent of the application is to provide value by solving the aforementioned business challenges by accounting for you resources, work, issues, progress reports documents, time, and expenses.

Please note: It is highly recommended to review the free, self-paced training classes for Salesforce.com fundamentals, customize and reporting before embarking on an implementation of this application. Furthermore, please consult www.crmsuccess.com for tips and tricks on customizing and creating custom formula fields, workflow approvals, validation rules, etc.

Additional help can be facilitated by your Account Executive.

Resources

Resource profiles help understand whose on the bench by tracking skills, experience and the consulting resume.

Resources can be both internal as well as external resources. Therefore, they can be tied to user records or contact records, depending on whether they are employees or subcontractors.

With internal resources, the user object is tied to the web-based and MS Outlook calendars so it is suggested to add a primarily role and location field to the user record for better sorting of resource calendars.

Preparing your requirements

- ☐ How do match consultants with the right projects?
- ☐ Describe your strategy on selling your team member to a client?
    - Do you use standard consulting resume templates?
- ☐ What attributes do you need to track? For consultants? For Subcontractors?
- ☐ Describe how you share best practices and templates across projects and consulting teams?
- ☐ Where do new team members go to learn about the services they are delivering?

Key Points

- ☐ Single database of all of your service delivery team (including contractors/vendors)
- ☐ Web-based calendaring
- ☐ Resume generation through mail-merges
- ☐ Increased productivity

Projects

A project is some type of work that needs to be fulfilled. By centralizing information you have the ability to manage all project information in a single place.

Projects are related to accounts and, optionally, to an opportunity. This relationship provides insight into the hand off between sales and services.

Within a project you may track qualitative information such as stage and percent complete.
Using the enterprise edition work flow feature, standard tasks can be created based on the project stage. This helps deliver projects in a consistent manner. These tasks can be synched bi-directionally with MS Outlook & Lotus Notes.

Another example of our platform available in any edition, is our standard custom formula fields feature. For example, you can use the project checklist to determine % complete.

There are many other pieces included with projects, such as emails, documents, issues, progress reports, time and expenses can also be tracked to projects.

Preparing your requirements

- ☐ What types of projects do you work on?
- ☐ How are project tasks tracked and meetings planned?
- ☐ How do you report on project progress status?
- ☐ If a project falls on its' side, who is responsible for picking it up?

Key Points

- ☐ Single database of all projects
- ☐ Real-time updates on projects for project managers, team leads, and sales
- ☐ Simple activity management with integration to your MS Outlook or Lotus Notes client

Project Issues

Project issues happen. Centralizing issue tracking is a great start to standardizing and improving on project delivery.

Basic issue tacking includes the issue age, status, who is responsible for reporting the issue, who is responsible to resolving the issue, the description of the issue and its' corresponding resolution strategy helps formalize the process in a simple, straight forward manner.

Using the issue report, it is very easy to download issues to excel for meetings. Mass updating issues via the excel connector is also a great time saver. See www.crmsuccess.com for more details on the excel connector.

Preparing your requirements

- How do you report on project progress status?
- How are issues managed?
- How are they mitigated on future projects?

Key Points

- Single database of all issues
- Segregate project issues from cases
- Real-time updates on projects for project managers, team leads, and sales

Project Progress Reports

Progress reports provide value not just by allowing the ability to track qualitative information post engagement, but also provide context for project managers and project accountants in making sure that the project is successful.

Many organizations consider their consultants their best sales people and so it is essential to provide the ability to identify cross-sell/up-sell opportunities in a simple manner.

Preparing your requirements

- How do you report on the status?
- Describe the client invoice dispute process?
- How does your sales team know when a consultant has identified a sales opportunity?
- Are the rewarded?

Key Points

- Provide a quick and easy way to track the qualitative information about a project
- Help finance research a disputed invoice with more than just a project hours report.
- Identify sales opportunities.

Project Milestones

Milestones further define project deliverables and help mark the progress of a project through your standard phases or gates.

In some use cases with fixed fee engagements, milestones can initiate the billing process.

Preparing your requirements

- How do use milestones today?
- Describe the criteria for a milestone status to change?

Key Points

- Similar to issues and status reports, provide the context for the billing of services.

Expense Reporting

Employee Travel Expenses are the #1 controllable expense in an organization.

Expense reports can be entered and tracked back to the project for reporting purposes. If you need to implement expense approval processes, our enterprise edition workflow approval functions can be implemented in order to track that process. In addition, you could add field history tracking to understand who has modified the record and when the change was saved.

For more information on expense reports: http://www.irs.gov/irb/2003-44_IRB/ar07.html

Preparing your requirements

- How are you collecting expenses?
  - What are "must haves"?
- What information do you need to track on an expense report?
- What validation rules need to be applied when entering expenses?
- What approvals need to occur?
- How are your employees reimbursed? What system? Accounts Payable System or Payroll system?
  - What is the interface file layout that the Accounts Payable System or Payroll System?
- Do you use company paid credit cards? How are those managed today?

Key Points

- Record expenses quickly
- Use the workflow engine for approval processes
- Use validation rules to verify the right information is being entered

Time Reporting

Time can be tracked and associated to projects.

For some customers and users, they will modify the timecard object to include cases (optional), opportunities, or accounts. In enterprise edition, you can use record types to delineate the project vs. case or account timecards.

Preparing your requirements

- How are you collecting time?
- What information do you need to track on an timecard?
  - What are "must haves"?
- What validation rules need to be applied when entering time?
- What approvals need to occur?
- Describe how time is used from a billing perspective?
  - What system generates invoices today?
  - What is the file layout that the Accounts Receivable Application requires to import data?
- What are the exception types for non-billable time?

Key Points

- Record time quickly
- Use the workflow engine for approval processes

- Use validation rules to verify the right information is being entered

Dashboards and Reporting

There are approximately two dozen report templates that come with the Professional Services Automation 1.0 application. In addition, there are three corresponding dashboard templates.

Services Organization Overview – the intent of this dashboard is to have a single view of people, project, time and costing metrics.

Project Dashboards – this dashboard is geared toward the project manager and their projects that they are managing.

Team Lead/Resource Manager Dashboard – for team leads and resource managers, insight into skills, demand, etc often go untracked. These dashboards help provide the facts based on activity generated based on your team's work