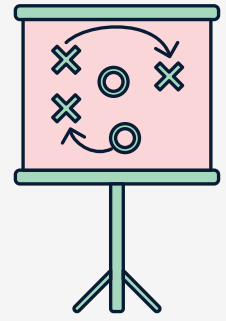# Professional Services Playbook

Implementing Professional Services Processes on Salesforce

ALLYN IT

Pre-Sales

Pre-sales resource and budgetary planning processes lay a foundation for successful project delivery. Customer accessible project plans support the sale by instilling the client with confidence. Standardize the Sales to Service handoff with process automation.

Delivery

Implement best practice project management processes and reporting to ensure consistent delivery. Manage risks and issues. Monitor slippage. Automate administrative tasks such as status report generation.

Client Engagement

Provide your clients with channels to directly engage with your tools and processes. Communities and web forms can minimize project administration and streamline collaboration between you and your stakeholders.

Project Profitability

Arm project managers and leadership with forward looking profitability metrics. Enable your managers to factor skills & costs into resource allocation decisions. Track labor and expenses.

Practice Profitability

Track productive and billable utilization trends. Understand the leverage model of your organization. Identify negative patterns such as rework and underpriced service offerings.

PS Operations
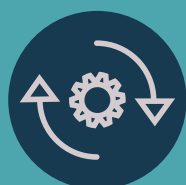
Support different billing models such as Fixed Fee, T&M, and Retainers. Reconcile data between your CRM and accounting system. Easily generate invoices. Enable your account managers & clients to monitor spend.