

## 5 Best Practices for Optimizing Professional Services

Professional services delivery plays a critical role in enabling internal teams, building external relationships, driving customer engagement, developing loyal customers and ultimately driving organizational profitability and ROI.

However, in many organizations these critical objectives aren't being met in whole or in part because professional services teams:

- Scramble to deliver service offerings on time and on budget
- Lack the ability to efficiently collaborate with internal or external stakeholders
- Face an overwhelming array tools that are not driving efficiency
- Struggle with visibility into resourcing and scheduling

With these obstacles, professional services teams do not know if customer engagements are profitable, which puts their department, their colleagues and their organization at risk.

However, it has been clearly established that professional services teams are vital for customer *and* organizational success, provided that such teams are optimized rather than overwhelmed. To achieve the former and avoid the latter, below are 5 powerful and proven best practices:

### 1. Enable Visibility across the Organization

Centralize all data and activities onto a work execution platform, in order to access real-time visibility into each PS engagement (schedule, progress, status, deliverables, etc.). This is vital for managing scope and avoiding scope creep, as well as identifying and responding to resource overload, and resolving issues that can threaten project due dates, margins and ROI.

### 2. Maximize Resource Utilization

Gain real-time insight into all resources and their current workloads, in order to build high performance teams and ensure that individuals are working on the most strategic activities. At the same time, review and forecast the impact of resource load changes in order to maximize efficiency, customer satisfaction and project profitability.

### 3. Streamline Communications

Streamline and simplify communications across internal teams and external stakeholders within the context of the work being done. Access specific workspaces to brainstorm and discuss updates and put all communication in the context of work by sharing real-time data and reports.

#### 4. Make Smarter, Faster Decisions

Establish customized KPIs and automatically roll up data into clear reports that measure variations between planned estimates and actual performance, as well as financial status and built-to-burn rates. This actionable intelligence drives smarter, faster and more accurate decisions, which ultimately delivers greater customer value, more profitable engagements and higher resource utilization.

#### 5. Drive Accountability

Establish accountability by empowering team members with the information they need to prioritize their tasks on time and within scope, so they're always working on the right tasks, at the right time. Meanwhile, transparency and accountability must also be part of the same approach.

#### The Bottom Line

Optimizing professional services involves supporting internal teams, managing external relationships, fostering customer engagement, developing loyal fans and ultimately driving organizational profitability. When these come together, service delivery success, high utilization rates and ROI become the standardized norm.

#### Moving Forward

Knowing the 5 key ways to optimize professional services in your organization is a big part of the picture but it's not the whole thing. You also need the right work execution platform to ensure that customer implementations are delivered on time and on budget, ongoing maintenance is efficient and effective and resources are kept off the bench and optimally utilized.

We'll focus on this critical aspect in a follow-up report, *Creating a 360° View of the Customer Engagement Lifecycle*