

Serviceaide Professional Services (a multi-million business unit) Runs Their Business on POB

ABOUT SERVICEAIDE



Serviceaide is a leader in AI based service and support solutions. The Global Professional Services team was using a variety of project management solutions and applications to track and plan their services projects, staff commitments, and reporting.

As the team grew and customer base expanded, the Head of Global Services realized that he was sitting on the best solution and built a custom application with the Point Of Business platform to meet the business requirements of Serviceaide and the services team.

THE CHALLENGE

The Serviceaide professional services team delivers on-site and remote implementation, upgrade, and ongoing software delivery services to customers worldwide. Customers purchase services in blocks of hours, creating a backlog that will be delivered as needed in the future. Without a dedicated capacity management solution, the services team was forced to rely on disparate solutions to manage their daily operations.

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Managing multiple resources, forecasting demand, capacity, utilization, and the backlog of hours owed to customers and completed hours became too complex for a spreadsheet. The seemingly simple tasks of reconciling remaining hours and setting proper customer expectations based on current backlog status were inefficient, time-consuming, hard to maintain, and required constant attention.

Serviceaide knew there was a better way to ensure efficient staff utilization and improve early awareness of resource shortages and excesses. They needed a global, consolidated, and mature resource capacity planning solution to track all active and inactive projects and provide organization-wide visibility and metrics.

ORGANIZATION

 serviceaide®
Global Professional
Services Organization

SOFTWARE

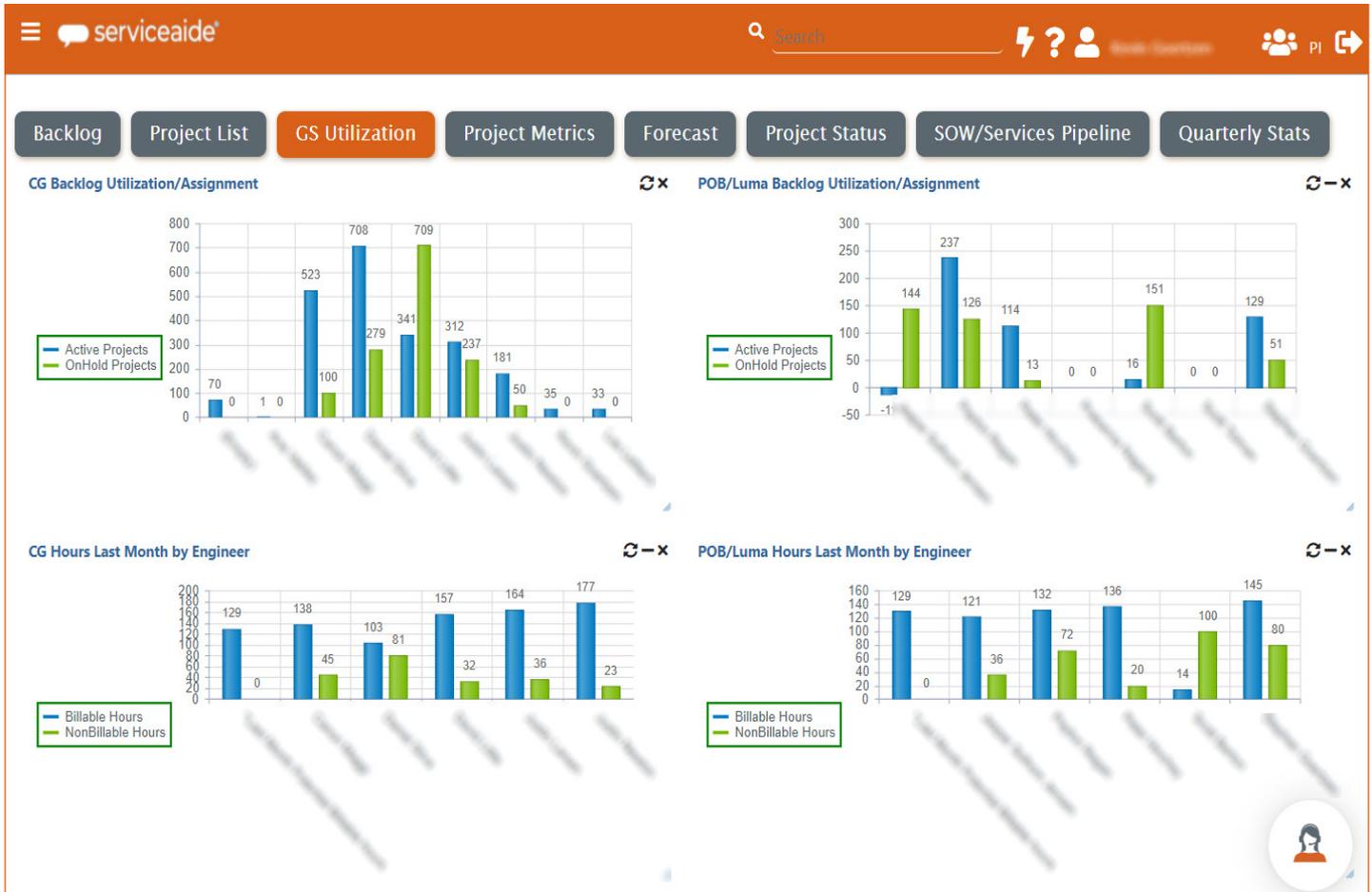
✔ Point of Business
Platform

BENEFITS

- ✔ Leverage automation to reduce manual hours on tracking, resource management and capacity planning.
- ✔ Improved reporting.
- ✔ Better customer transparency.

THE SOLUTION

The team craved a more productive method for managing projects, and they knew that using their software solution, the Point Of Business Platform (PoB) would provide the functionality required. Capacity planning required a consolidated dataset with real-time data for informed decision-making. The importance of aligned capacity and demand was even more critical since service resources become eligible for incentives when they reach a 68% quarterly utilization rate. Today, the project management team has projects, utilization levels, metrics, forecasting, and statements of work in one connected, automated, and manageable location.



Projects: The project list includes all active and inactive projects, the contracted hours, billable hours, percent complete, and expected completion date.

Utilization: Here, management has visibility into the percentage of employees' available time used for billable tasks.

Forecast: The management team needs the ability to forecast the gap between capacity and demand for resources in real-time. The project management team understands what projects are coming up each week and will bridge the gap. If a service resource has low utilization in the future, it's easy to fill hours with upcoming projects. The goal is to ensure resources are utilized appropriately.

Metrics: Project: specific metrics and a sales dashboard are available for organization-wide visibility. The sales team can monitor project status, including planned and actual go-live dates. They can see how projects are progressing and watch for sell opportunities.



THE RESULTS

Capacity planning plays a vital role in Serviceaide's ability to manage projects by accurately planning and forecasting. Most importantly, the project management team proactively takes corrective actions before impacting customer satisfaction. The right resources available at the right time reduce costs and optimize project management processes without compromising customer satisfaction.

By automating in PoB, the project managers save at least 20 hours per week formerly spent on capacity, project, resource, and utilization management. In addition to the time saved, the team benefits from metrics and cross-department collaboration.

The new project management tool benefits service consultants, management, and customers. Internally, projects are tracked daily and easily updated with automation to pull data across sources.

POB supports multi-departmental inquiries and reporting. Management can review actively monitor utilization and track customer activity. Finance can easily quantify the number of billable hours rendered as required for GAP accounting principles per month and quarter. For example, revenue cannot be recognized until the services are delivered, even if they were pre-purchased. The system enables Finance to quickly understand what has been delivered. Finally, business unit profit and loss reports are now readily available to review and share.

Customer transparency is a priority. They can quickly request project status and utilization on service contracts. This visibility and access increases overall customer engagement and improves customer confidence in our business and their implementation.

Ask about how Serviceaide can design a customized solution for your business.