BIGTIME

BUYER'S GUIDE:

What to Consider During the PSA Software Implementation Process

Leanna Michniuk

Content Marketing Strategist,
BigTime Software

Table of Contents

Introduction to Software Implementation

Evaluating Professional Services Automation (PSA) software can come with its own set of challenges. With many options and deciding factors to sort through, it can feel like a daunting process. One of those important deciding factors for what PSA software option is right for your team and organization is PSA **software implementation.**

The effectiveness of PSA software ultimately depends on the success of its implementation and its adoption. A well-planned and executed implementation strategy can help ensure that the software is rolled out effectively and users are trained properly. How good is the software if no one wants to use it? A good implementation process acts as insurance, protecting your investment.

On the other hand, a poorly executed implementation strategy can lead to delayed projects, cost overruns, and low user adoption. It can also lead to low engagement, incorrect usage, or even rejection of the software.

It's essential to evaluate a software provider's implementation methodology, customer support, training, and any potential costs or risks associated with implementation.

But before we get into implementation, it's important you read the first part of this series, **Buyer's Guide: How to Choose the Best PSA Software for Your Business.**

In the guide, we discuss:

- The benefits of PSA software
- Things to consider during your search
- The steps to evaluating and selecting the best PSA software for your organization
- Questions to ask vendors
- Who to include during the search process
- PSA software evaluation templates to use in your research

Now it's time to dive into PSA software implementation and why it's such a key piece of the software evaluation puzzle.

6 Things To Look for When Evaluating PSA Software Implementation Processes

1. What dedicated roles and resources will be available to you and your team during the implementation process?

Implementation is a team effort and a dedicated implementation team can offer you invaluable guidance. In our first guide, we stressed the importance of selecting software that is built to the way your industry functions. This value goes even deeper in the implementation process if you're able to have access to a team of professionals with years of knowledge as to how other firms within your industry have set things up and seen success.

Think of the different roles on this team acting as a consultative group, using their industry expertise and know-how to get you the best results to help drive growth and bottom lines.

An implementation team should have clear objectives and milestones and communicate regularly with your organization to provide updates on progress and any issues that may arise. Lastly, a majority of these roles should go beyond the implementation process and remain your partners throughout your time using the software.

Be sure to ask the software vendor what dedicated roles will be available to help you throughout implementation and after go-live. Software vendors may offer you a mix of the following roles:

Implementation Manager

This person is typically a dedicated resource for your account to help with account setup, configuration, and training until you are ready to "go-live" with your new solution. Think of this role as your project manager to get you up and running from the start.

Data Import Specialist

If you have a lot of necessary historical data to be converted into the new system, many vendors will have a dedicated person to take this burden off your plate. They'll work with you on getting all data together, wherever it may be, and making sure it successfully transfers over in a way it makes sense for your organization. For example, if you have a specific way of naming something, this specialist will make sure it's the same in the new system.

Solution Consultant

These consultants are highly specialized in mapping your business processes to updated best practices. They'll ask questions and hear from your team in order to understand your current state of business. They'll then take into consideration your ideal state and apply your current processes to the tool to get the most value out of the software. They'll be your guide in improving internal operations and customization.

Customer Success Manager

The customer success manager ensures you're getting the most out of your investment. They'll fill you in on new product releases or untapped benefits to help you succeed and see the most ROI from the solution. This role typically has the most long-standing relationship with your firm after implementation to make sure you are able to continue to grow within the software.

LOOK FOR:

A vendor that assigns dedicated roles and resources to the implementation process, such as implementation specialists and technical support staff.

2. Will there be ongoing product updates that help support your business?

There's nothing worse than software that starts to fail on itself due to a lack of maintenance and updates. Look for a vendor that is constantly improving and proactively monitoring the health of the solution so that your firm can continue to operate smoothly with confidence in the software. This can include regular software updates, security fixes, and new features that improve the software's functionality and usability.

LOOK FOR:

A vendor that provides ongoing maintenance to catch issues before they arise, such as software updates, maintenance, and proactive security monitoring.

3. Is there a formal onboarding process or will you have to do a lot of it on your own?

A formal and well-structured onboarding process can help ensure that everyone in your organization is trained and ready to use the new software. It's important to have a clear and concise plan outlining the necessary steps for employees to learn the software so everyone can be on the same page as far as expectations and timelines. We'll talk more about what this process should look like later on!

LOOK FOR:

A vendor that provides a formal onboarding process, which may include documentation, training sessions, and other resources.

4. Will you have access to a customer support team when you need help?

When issues arise, you need to be able to get in touch with a customer support team quickly and easily. A good customer support team should be knowledgeable about the software and be able to provide prompt and effective solutions to any problems that may arise and be committed to ensuring your satisfaction with the product. Make sure you're comfortable with the communication options and availability of the vendor you choose.

LOOK FOR:

A vendor that offers access to a dedicated customer support team who are available either through phone, email, or live chat support, ready to solve any issue you have.

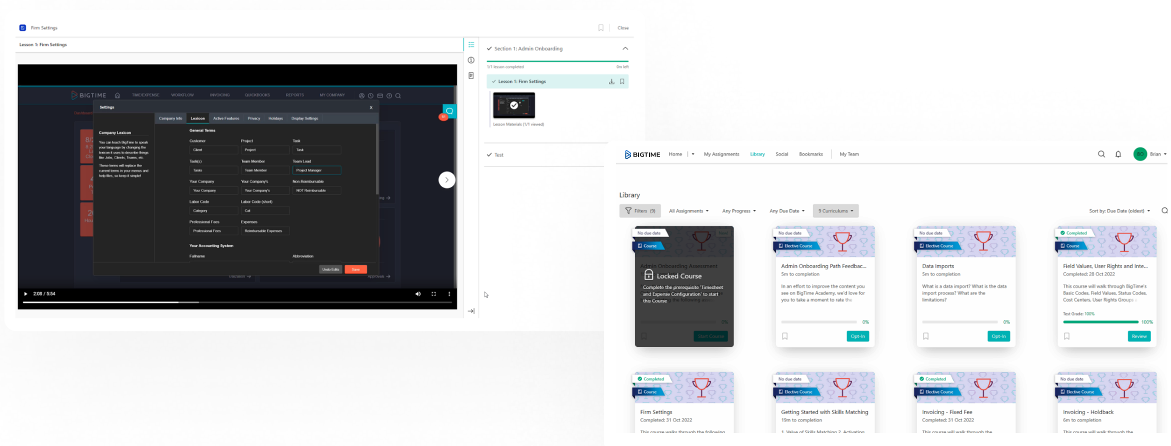
5. What kind of self-help and learning resources will be available to your team?

Self-help resources and learning materials can be incredibly helpful for employees who are learning to use new software, or maybe just need a refresher. These resources are especially helpful when new software updates are regularly being rolled out and can help reduce the need for customer support. Another perk? This kind of learning gives you a head start with "how-tos" so the time spent with your dedicated implementation team can act more as a consultative meeting, reviewing best practices and any questions your team may have.

LOOK FOR:

A vendor that provides a knowledge base, user guides, video tutorials, and other resources that your team can use to troubleshoot issues or learn new features.

One great example of how BigTime promotes this vital part of the implementation process is through BigTime Academy. BigTime Academy offers "how-to" videos that give you a visual aid in a live environment. You're able to watch a BigTime team member access and use features, from timers to invoices.



6. How will you train new hires on using the software?

Training for new hires is an important aspect of software implementation, especially as organizations grow and change over time. New employees will need to be trained on the software to ensure that they are able to perform their job responsibilities effectively and efficiently. Another perk of BigTime Academy is that it offers course certifications for people new to the software. Having this kind of training takes the burden off of your admin's plate and you can rely on BigTime to help everyone on your team be educated and skilled when it comes to using the software.

LOOK FOR:

A vendor that provides training resources for new hires to take the weight off your team internally.

How to Facilitate the PSA Software Implementation Process Internally

If you recall from our first **Buyer's Guide: How to Choose the Best PSA Software for Your Business,** we discuss the importance of involving stakeholders in the process of evaluating PSA software. During the discovery phase of evaluation, we suggest you ask different departments within your organization questions about what they're looking to get out of the software and what their needs are.

Circling back to the knowledge from those discovery sessions will help make sure those needs are being properly accommodated during implementation. Having these needs/questions documented can also help implementation specialists answer specific questions and prioritize different training sessions for each stakeholder. It can also get your team excited about using the new software and gain more staff buy-in.

We've outlined below the different departments that make up a typical professional services organization, highlighting which roles should be included during the implementation process, and what features they'll need to be well-educated on.

Operations

Review their needs and include them in training on:

- Budget tracking and management
- Time and expense submissions
- Review and approval processes
- Staff capacity planning
- Reporting dashboards
- Adjusting user rights

- Integrating to accounting software (QuickBooks, Sage Intacct, Intuit Lacerte)
- Integrating to Customer Relationship Management (CRM) platforms (Salesforce, Hubspot)
- Integrating to communication software (Slack, Google apps)

Project Managers

Review their needs and include them in training on:

- Budget tracking and management
- Review and approval processes
- Staff capacity planning
- Tracking budget vs actuals
- Integration to project management software (Jira, Asana, Smartsheet)

Finance

Review their needs and include them in training on:

- Billing models configuration
- Invoice branding
- Customizing invoice templates to client needs
- Adding expense receipts
- Review and approval workflows for invoices
- Payment collection methods
- Reporting dashboards
- Integrating to accounting software (QuickBooks, Sage Intacct, Intuit Lacerte)

Leadership

Review their needs and include them in training on:

- Utilization rate tracking at project and firm level
- Invoice branding
- Reporting dashboards of project vitals
- Job costing and project margin reports
- Measuring project profitability
- Revenue forecasting

Front Line Staff

Review their needs and include them in training on:

- Submitting time and expenses
- DCAA time tracking compliance (for government contractors)

PSA Software Implementation Steps: Setting Goals & Milestones

Now you're ready to begin thinking about your timeline. It's best to find a vendor that has a crawl, walk, run approach to implementation. This approach helps you plan goals and milestones realistically so you're not missing an invoicing cycle or overlooking important details. Because you're not doing everything all at once, staff will also be less likely to feel overwhelmed and stressed.

The best way to go about setting up your timeline is to work backward. Think about your endgame — do you need to be out of another system by a certain time? What's your billing/invoicing cycle? Backtrack from there to think about when you need time tracked. For example, if you invoice at the end of the month, you'll want time tracked for at least one month before that. Now that you have these rough dates in mind, it's time to think about milestone mapping.

Below are 3 common milestones you'll experience during PSA software implementation and questions you should keep in mind along the way.

Milestone 1: Pre Reqs

Like anything, it's important to start with the basics. This first milestone includes getting you up and running with project setup, resource management, and time and expense tracking. It's all about getting you and your team set up with the fundamentals of PSA software and ready to use it.

Project Setup: Things to Think About & Questions to Ask

- Will you have a dedicated data implementation specialist to help you carry over existing data to the new system?
- Where is all your existing data?

- Are you using spreadsheets?
- What integrations do you need help syncing?

Resource Management: Things to Think About & Questions to Ask

- How are you tracking budgets to projects?
- How are people designated to projects?
- How are bill rates defined? (ex: project, client, staffers role)
- How often are you billing?
- How are you allocating resources to a project currently?
- Do you allocate project time vs. non-project time?
- Are your projects an all-hands-on-deck approach or do you limit visibility per project per staffer?

Time and Expense: Things to Think About & Questions to Ask

- Is your work breakdown structure different from your client-facing statement of work?
- Is there any flexibility on where time and expenses are tracked?
- Are you able to leverage vendor expenses?
- What kind of workflows are there surrounding approval processes?
- How do you plan on training staff on entering time and expenses?
- Are you tracking holidays?
- How often do you bill expenses?
- How do you bill your customers? Timing/format

Milestone 2: End Game

What's better than getting paid for you and your team's hard work? This second milestone involves setting your organization up to send out invoices and receive payments using the data entered from the first milestone.

Payments and Invoicing: Things to Think About & Questions to Ask

- How do you create an invoice?
- What is your invoicing cycle?
- What are your must-haves on invoices?

- What do you want your invoices to look like?
- How do you apply a payment?
- How are you able to mark an invoice as paid?
- How do you take payments?
- How do you want to report on invoices/payments?

Milestone 3: Last Step

This last milestone uses all the data and information collected from your projects, the time and expenses entered, and invoices sent to create reports. These reports, if used correctly, can allow you to make faster and more informed business decisions.

Reporting: Things to Think About & Questions to Ask

- What does the reporting module look like?
- Can you customize reports?
- How can you share reports?
- What do the reporting user rights look like? Who can see what?
- What reports do you run monthly/quarterly/yearly?
- Who looks at these reports?
- What are you trying to achieve with these reports?

What PSA Software Implementation Looks Like With BigTime

We're proud to say that BigTime has been **ranked #1 in customer satisfaction and most implementable** since 2018. We've maintained this top ranking through our dedicated U.S-based implementation and support team. This team includes an implementation manager, customer success manager, data import specialist, and solution consultant who cater your onboarding to your firm's unique needs.

As a BigTime customer, you'll get access to helpful resources such as recordings of all your implementation sessions, how-to videos, an onboarding deck, articles, and webinars. We also provide ongoing assistance through a knowledge base library as well as a support team available to you every day.

> *BigTime is a highly robust time-keeping, resource management, and billing system with a first-rate implementation process. The high level of attention to clients' needs AND wants creates a custom experience from the start. The assignment of a dedicated individual to walk through the build process, assist with the go-live, and troubleshoot everything along the way provides a level of security and comfort that is essential to making one feel confident in transitioning to a new system. Maneuvering through their self-help knowledge base is intuitive; to date, every question researched has been answered. Moreover, when struggling to know what to query in the knowledge base, the live chat team is responsive, hands-on, and determined to help. Thus far, our experience has been stellar.*
>
> ***—V.F***