6 SIMPLE STEPS FOR SELECTING THE PERFECT PROFESSIONAL SERVICES SOFTWARE

INTRODUCTION

Professional services automation (PSA) software is designed to automate and manage common service-based business tasks. This technology is popular with firms in the architecture, engineering, legal, accounting, and IT/business consulting industries, and among project managers.

PSA software aims to ensure that projects are delivered on time, within budget, and according to clients' needs and preferences. These systems enable the tracking, planning, managing, and billing of services through features like project management, resource management, time and expense tracking, billing and invoicing, and reporting and forecasting.

By adopting this software, you centralize your business workflows and data, deliver services to clients more predictably, automate repetitive manual tasks, and establish consistent methods for planning, managing, and measuring project performance. These optimized processes can lead to visibility and improved performance metrics across profits, revenue, cost, and employee utilization.

So, with an abundance of software options available to your firm, how do you go about choosing the most optimal solution? Let's start by determining your unique business needs and identifying popular professional services automation features. Software requirements will differ depending on your firm's size, industry, amount of work, and typical projects. ***Before you start gravitating toward a particular platform, first consider your organization's goals and priorities.***

STEP **ONE**

DEFINE YOUR NEEDS

To begin your time tracking software search, identify what your Step number one is to identify what your firm needs to make this software investment a success. Consider your current processes, if you want to change them, your objectives and needs, and the specific problems you're attempting to solve.

One of the best ways to identify what you're trying to accomplish is to get feedback from others in your company. Pinpoint two to three fundamental problems that need to be solved, like poor utilization, lack of business intelligence, inadequate time management, and so on.

Make sure that your team reaches a consensus on objectives, deliverables, training, scope, timeframe, approach, and more. Be clear about why your firm needs this software and realistic about where it'll fit into your technology architecture.

Take time to read editor reviews on reputable sites like G2 and Capterra, as well as user reviews from firms similar to yours. Look for details in the reviews related to customer support, user experience, and long-term results. You may also be able to find video reviews and product walkthroughs on YouTube that give you a better sense of how each PSA system functions.

To conduct a successful introductory software search, answer these prompts:

— What is your staff's general familiarity with technology? How much time and effort will it take for them to get comfortable using the platform?

— How does your team usually work? Do they need a tool with mobile access? How about multi-currency billing options?

— Consider your current and prospective IT burden. Will this solution ease any issues, helping you save time, money, or reduce friction among siloed systems?

— What type of communications do you have with clients? How can the PSA software streamline them?

— What tracking options does the software provide?

— Make a list of the other software your firm considers indispensable. Will your PSA system need to integrate with it or perhaps eventually replace it?

Our suggestion is to draft these questions and answers somewhere easily accessible by you and your team.

NOTE: The questions suggested are starting points; we encourage additional, personalized prompts based on your needs.

STEP **TWO**

NARROW IT DOWN

Once you have your long list of potential PSA solutions, start eliminating options based on what won't work for your firm. Separate your must-haves and nice-to-haves. If you currently use or previously tried similar technology, list what you like about it and where it falls short. This will ensure you don't end up with software that still doesn't help your business operate effectively.

In addition to assessing your current needs, it's crucial to plan as much as possible for your firm's future. Do you plan to hire several more employees? Will you significantly scale your workload? The software you choose should support your company's growth without needing to hire additional administrative staff.

To further future-proof your project management and service delivery, ask each software vendor about their product roadmap. How often do they release new features and partnerships? Are they planning to introduce more products? Look for solutions built on APIs (application programming interfaces), which offer more integrations, power, and flexibility.

Be on the lookout for obvious reasons to eliminate systems on your list. For example, certain products may not fit your technology architecture. Some may be too new, too expensive, or missing a feature that's essential to your business. User reviews will also help you spot red flags. Once you've evaluated your list using these lenses, a shortlist will emerge.

STEP **THREE**

COMPARE AND CONTRAST

Now that you have your shortlist, compare each platform's cost, how advanced its features are, the level of customization offered, user-friendliness, logistics, security, and more.

Read testimonials and watch tutorials of the software in action to get an idea of the user experience. Then, schedule a call with each vendor to communicate your needs and goals. If necessary, send a request for proposal (RFP) for comprehensive feedback. Discuss the materials you receive with stakeholders in your team, emphasizing the tooling and details that matter most to you.

Map the features of each package against your requirements and weigh the factors to determine which one most closely meets your needs. Assign a number to each solution based on how well it meets each requirement, multiplied by the weighting factor. The one with the highest score across all requirements should be the best for your firm, but you should also have a backup option.

Here's a PSA features checklist to help you assess each option. You won't necessarily need all of these functionalities, but it's useful to be thorough in defining what you want.

- — Project management
- — Billing and invoicing

— Time and expense tracking

— Collaboration tools

— Task prioritization

— To-do lists

— CRM

— Resource management

— Reporting and forecasting

— Accounting capabilities or integration

— Native apps for iOS and Android

— Cloud-hosted

— Notifications

— Application program interface (API)

— Security

— Level of customization and scalability

Don't forget to outline what features your company is currently using and which features will benefit your company in a future state.

STEP **FOUR**

SEE IT IN ACTION

Now that you know exactly what you're looking for and have narrowed it down to one or two choices, it's time to get a personalized demo. While you've already had a call with the vendor and watched video tutorials or reviews, it's important to get a sense of exactly how you'll apply the software to existing processes or what you'll need to adjust. Invite the firm's stakeholders to the demo to see if the technology meets their needs, then debrief afterward.

Many SaaS companies offer a free trial of their platform, which you should take advantage of. However, it's still a good idea to first complete the demo and have the software rep explain everything to you and address your specific questions and concerns. This will ensure your free trial gives you the clearest sense of if the software fulfills your needs.

Whether testing the software yourself or attending a walkthrough, pay attention to the solution's ease of use. If you and your team are confused or notice any issues, address them during the demo, but note that the software might not be suitable for you.

STEP **FIVE**

CONSIDER THE LOGISTICS

Even the most seemingly straightforward software programs can give you a headache if they don't fit into your firm's ecosystem. Whether it's customizations, integrations, or IT, you must ensure that the software will work for you.

Once you've tested each program, you should be able to conclude whether or not there's an out-of-the-box product that will fulfill your needs. Talk to the vendor to see how customizable their software is and how much it would cost to include all your required features.

Additionally, a lack of consistency or integrations can cause software to fall short of your needs. Whether you choose a simple solution aimed at small businesses or a more advanced one with many customization and reporting options, ensure it has all the integrations you need. If it doesn't, ask if the integrations are on the vendor's product roadmap or if you can reasonably supplement it.

You must also consider the software's IT requirements. Can you implement this solution today? Is it complicated to install and train employees to use it? Ask how the vendor will manage updates and upgrades. Ideally, updates should be cloud-based for ease of installation so they don't disrupt operations.

For some companies, it's a good idea to loop in additional stakeholders to make a best decision for cross-functional teams.

STEP **SIX**

KNOW WHO YOU'RE DEALING WITH

Who your software vendor is matters. Find out if the vendor will provide personalized training, either remotely or on-site. Consider the documentation you'll receive, setup support, and long-term technical support. Ask if assistance is available 24/7 or only between certain hours. Note if the vendor has a customer service team standing by the phone or if you can only receive guidance from an online forum or FAQ page.

Ask yourself: Is it easy to work with the vendor? Do they focus on your needs, or are they just interested in selling software? Reread user reviews, but this time, focus only on mentions of customer support to determine if the experience is usually helpful or disappointing.

Look into the history of this software provider. How long have they been in business? Check their website's featured clients page to see if they already serve clients similar to you. Look into the vendor's trajectory and financial health. Are they growing or remaining stagnant?

We also recommend review websites like G2, Capterra, and Software Advice, for unbiased qualitative feedback.

CONCLUSION

Carefully choose your PSA software, and you'll reap numerous benefits, including stronger margins, optimized resource use, and smoother project delivery. Automate manual time/expense tracking and project management tasks, gain real-time visibility into KPIs, and offer services to clients more effectively. It doesn't matter how small your firm is — there are professional services automation solutions available that provide greater efficiency, lower overhead, and more rapid growth.

As you evaluate PSA software for your firm, ask yourself these key questions:

— Does the software meet your team's needs? How will it support your top business goals?

— How easy will it be for your average team member to use it?

— Is it straightforward to build and share custom reports?

— How much does the software cost? Are there fees related to setup, training, recurring, maintenance, and support? Obtain a detailed written summary from the vendor before purchasing.

— What training options are available? Is there online training? Does the provider offer personalized training, either remotely or in person?

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