

# Unleash professional services growth

By putting your customers at the  
center of everything you do

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RUN A CONNECTED BUSINESS



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# Connecting customer centricity to business growth

The winners in an all-digital professional services world will be the ones who engage customers directly and in a personalized way at every touchpoint in the business, including the “back office.” Many companies claim to be centered around the customer, but the customer experience proves otherwise.

# Consider the typical B2B customer journey.

A salesperson builds a relationship with a prospective customer to understand the ins and outs of their business goals, their organization, who will use the new technology, and how. Once the deal is signed, however, too often all the valuable intelligence gathered by the sales reps doesn't make its way to the professional services team. As a result, the customer must once again share this information during the implementation phase.

Once the solution is implemented, this disconnect becomes apparent again when the customer reaches out to the support team. With little information about the implementation or customization, the support team must rely on the customer and professional services team to fill in the knowledge gaps.

This disjointed customer experience burdens the professional services team with continuous asks of their time while threatening their ability to secure future business with customers.

Organizations need to break down these walls between departments and evolve the company culture in order to fully satisfy customer expectations and sustain strong, healthy customer relationships.

By ‘throwing customers over the wall,’ Professional Services inherits problems without the ability to plan the appropriate account strategy. ”

**John Ragsdale**

Distinguished VP, Technology Research  
TSIA

# In this ebook, we explore:



# What it takes to be truly customer-centric

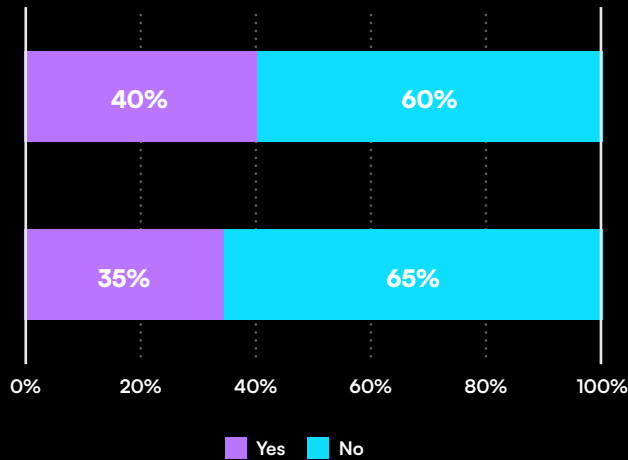
Customer centricity is about organizing a business around the customer, both from the perspective of organizational culture and technology. However, few companies truly live up to this promise.

In the on-premise world, a “launch and leave” mentality was prevalent among professional services teams. Once the customer was up and running, Professional Services moved on to the next project with little handover to the success and support teams.

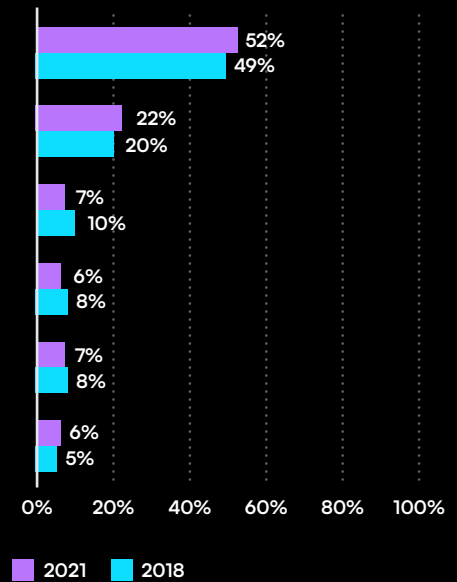
In the subscription world, business growth hinges on delivering continuous value to customers. If a customer doesn't realize the anticipated business value from the implementation, they're unlikely to renew their contract. So organizations must emphasize outcomes over products and create offers focused on value creation.

# Delivering Value vs. “Launch and Leave”

Do you have a methodology for developing PS offerings that are intended to increase adoption of products by existing customers?



PS Revenue Source

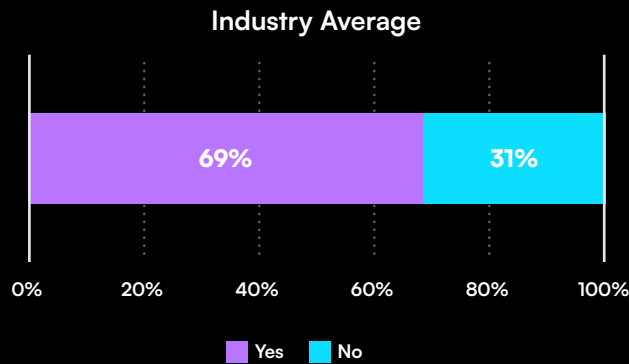


Source: Technology Services Industry Association (TSIA) Professional Services Benchmark

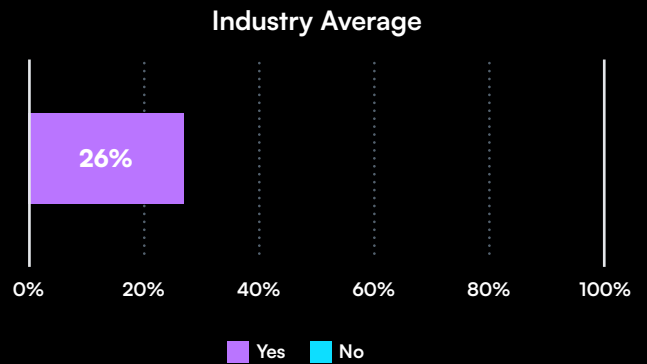
While the bulk of professional services revenues still stem from implementation and integration, 35% of industry-wide companies surveyed by the Technology Services Industry Association (TSIA) report having a methodology for developing offerings designed to increase adoption and value. This figure jumps to 40% for everything-as-a-service (XaaS) companies based in the cloud, signaling a move beyond the “launch and leave” mentality.



Does your company have a formal customer satisfaction measurement process for PS engagements?



For what percentage of completed PS engagements do you receive a project satisfaction rating/score?



Source: Technology Services Industry Association (TSIA) Professional Services Benchmark

At the same time, organizations must better track customer satisfaction all along the customer journey. Too often, each department that touches the customer uses a separate siloed customer satisfaction survey and uses their own customer analytics. In fact, according to TSIA, 69% of professional services organizations have a formal customer satisfaction measurement process, but only collect satisfaction scores for 26% of engagements.

When everyone works in different systems, teams are doing their jobs with blinders on. Companies must consolidate their customer satisfaction efforts and data to truly understand the sentiment and experience of the customer each step of their journey. Only in this way can they truly understand and improve the health of an account.

These are a few of the key steps organizations must take to truly become customer-centric. With the right framework and processes in place, businesses can put customers at the center of everything they do - and fuel innovation and growth.

## Increasing solution and services margin



# Roadblocks to customer centricity

Customer-centric organizations must address both system and culture issues. A common roadblock occurs when organizations using multiple systems and manual processes move to a single platform. Rather than address their process shortcomings, they try to replicate what they currently do in a new platform. The irony is that their current processes and setup aren't working and a single platform is intended to help them do things differently and better.

To avoid this pitfall, organizations should consider their customers' needs when setting up systems and new ways of using data. In addition to breaking down departmental silos, information must move in a bi-directional manner from sales to service to support and back. This helps ensure the organization can seamlessly address customer issues at any time, and tees up future sales and service opportunities.

Common culture roadblocks include a disconnect between who owns technology and who uses it. It's essential that technology owners and users are aligned at the start of any implementation focused on enabling customer centricity. Designing for customer centricity always starts with understanding what's important to the customer and then delivering on that expectation. The key is implementing effective processes and technologies that empower employees with the right knowledge, resources, and support to drive continuous improvement and happier customers.

It's not enough to have Ops and IT involved in designing the technology. They need to hear how subject matter experts will use the technology so they can work together toward a unified solution. ”

**Suzanne Lesser**  
Learning & Development Consultant  
CLD

# Improve projects and customer experience by consolidating systems

By consolidating systems, organizations ensure people have the right tools so they can focus on the customer. Services organizations working on a single platform have more visibility into what other teams are doing and can see how everything flows downstream and affects each area, allowing them to work toward a common goal.

Examples of how everyone works better in the name of the customer and the business include:

- If an opportunity has closed but the project hasn't started, sales can see that and follow up to ensure the client is okay being in a holding pattern.
- If the go-live date has passed but the project hasn't started, operations can reach out to finance to ensure all paperwork is in place.
- If a project has been created but no project manager has been assigned, a staffing manager can work with a practice lead to ensure the right person is assigned.

With sales, service delivery, staffing and finance on the same platform, internal communications based on shared, better data streamlines processes. Moreover, professional services can focus on the customer because they can see the entire lifecycle and how their role affects that relationship.

# Driving better decisions through consolidation

With more systems consolidated, complete visibility into customer data can lead to smarter, real-time decision making. Here analytics plays an important role.

Analytics are often used or justified to address a specific challenge, such as increasing sales, reducing service costs, reducing customer churn, or improving satisfaction. However, the impact of analytics goes well beyond the primary lever to amplify the impacts of a customer-centric organization.

When organizations gain insight across regions and practices, they enable more collaboration, which in turn improves the health of their business. Examples include:

**Modernizing employee experience.** Employees whose day-to-day systems are modern and efficient are more engaged. And those who have more agency to deliver customer satisfaction feel more fulfilled in their work and connected to the mission of their employer. Enabling employees to be more successful also elevates their productivity, driving improved customer experience and business growth.

**Pursuing new opportunities.** By applying analytics to a single source of connected data, organizations can better connect their front and back offices. This presents new opportunities, such as by calling upon insights into the delivery organization to structure sales deals in more creative ways.

**Adjusting to market conditions.** As organizations enter new markets and exit existing ones, analytics provides the flexibility to do so quickly and effectively by helping identify and launch new and enhanced service offerings.

**Driving sales and growth priorities.** With sales and services on the same platform, organizations can forecast from both opportunities and existing projects. For instance, insight into trends can help determine where to focus sales efforts, such as pushing a deal to close or reaching out to potential clients in new industries.

**Developing new value-based services.** Insights into project trends and customer asks can help guide the development of new offerings.

**Making smart staffing decisions.** Visibility into existing projects and resourcing needs enables better staffing decisions and more accurate growth targets. This affects how you hire resources, upskill current staff, reallocate underutilized resources, and understand and address the reasons for unassigned hours on existing projects.

Both small and large companies benefit when they close their data gaps. With analytics, no one needs to wait for a report. Anyone can look at a dashboard and make an educated decision to move forward based on what's happening in the pipeline, the status of projects, and customer needs and requests. Knowing all this helps build sustainable client relationships that drive business growth.

By building our own tools, we can completely control the customer experience as our company grows. ”

**Peter Short**

Vice President of Consulting Operations  
Traction On Demand



# The real-world value of being customer-centric

Traction on Demand, a Salesforce implementation partner, has evolved thoughtfully to ensure it focuses on the customer experience. It doesn't approach any project with a single start or finish, but rather as an ongoing effort to build, improve, strengthen and enable customer success.

Key to this approach is its customer-centric "Squad model," which the company launched after seeing a lag between projects as customers worked with different project teams.

Squads consist of a set of professional services employees who specialize in technologies, such as Salesforce and specific cloud offerings, and verticals aligned with customer needs. With the Squad model supported by connected processes and customer data, Traction on Demand was able to ensure consistency for customers and efficiency across projects.

As it has scaled, Traction on Demand has been hypersensitive to not leaving small businesses behind. To that end, it rolls out offerings — such as managed services — to support smaller implementations. It also built an "Innovations" team focused on developing accelerators that drive faster time to value for customers.

This specialization strengthens the company's partnerships with vendors like Salesforce while also better serving customer needs.

Seven years after launching its customer-focused Squad model, the company has grown from 100 people to over 1,000 people, with 500 consultants billing on projects. Moreover, a 360-degree customer view has influenced the company's growth strategies through the pandemic. It gains this view through a number of products and companies it has launched, including Bettr.me to log employee and customer sentiment; Traction Gather for events; Traction Guest, Traction Rec, and Traction Complete.

70% of Traction on Demand's bookings have consistently come from return customers, and these strong partnerships paved the way for transparent and realistic conversations about their appetite for spend once Covid-19 hit.

In spring of 2020, the company immediately focused on customer sentiment with special attention to industry-specific impacted customers. It then reforecasted its sales pipeline and worked through business challenges and decisions using a custom revenue forecasting tool in Tableau. This tool combines the value of the company's backlog with factored open sales pipeline for an accurate view of monthly revenue forecast for the coming 3-4 months.

That said, companies realize a range of ROI as they transform by consolidating systems and information, and not all systems are equal in terms of reducing costs or increasing revenue. Within larger and older organizations, cost savings from system consolidation alone can often more than justify the effort. A 75% reduction in systems and more than 30% reduction in direct supporting costs are not uncommon, in Salesforce's experience. Just looking at core sales processes, Salesforce has seen a multi-billion dollar organization realize a 10% increase in professional services incremental revenue.

What's the cost of not transforming? Your competition is not standing still and customer expectations are continually evolving, so you risk disruption. ”

**Robert Watkins**

Senior Director, Business Value Service  
Salesforce

# Address change management to succeed

While the benefits of consolidation are clear, change can be hard. When project teams are focused on implementing new technology, they sometimes overlook how it affects the behavior of the people who will be using it. As users anticipate the effects of new technology and start discussing it, information can get distorted and employees can become resistant before the technology goes live. That's why it's key to ensure that everyone understands the coming changes.

To help get everyone on the same page, build change management support and end user training into every project. Organizations can address this through:

- Regular communications from relevant managers
- A forum where end users can ask questions
- A demo of the new system so everyone understands the benefit of the technology
- Training everyone who will be touching or affected by the new technology so they know how to use the new technology, how it will make their jobs easier, and how it will free them to focus on customers

## **Transformation begins with a customer experience strategy**

The services companies that win will be those that are most responsive to prospect requirements, excel at reinforcing their trusted advisor status remotely, and are a step ahead in providing offerings that help accelerate recovery. Consolidating systems and data is essential to creating the foundation for that approach.

With any transformation project — in particular transforming the customer experience — this four-step approach is valuable.

- 1.** Understand the experience you want to create for your customers.  
Remember: It takes all departments working in concert to deliver on your customer experience mandate.
- 2.** Understand the capabilities and offers you need to deliver that experience.  
For example, perhaps you need additional communication channels or collaborative tools.
- 3.** Identify changes needed to people and processes. At a high level, this is about changing the culture of the company to be truly centered around the customer.
- 4.** Identify the technologies that enable your customer-centric vision. Technology can solve just about anything, but you must first understand what the technology needs to enable, which is why it's essential to understand what people and process changes are necessary.

By embracing this approach and consolidating systems and data, professional services organizations position themselves to identify and pursue new opportunities faster than the competition.

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