

CONNECTING PEOPLE, PROCESSES AND TECHNOLOGY

When people are your product, the ability to leverage “people, process and technology” is fundamental to running a successful professional services organization. With Changepoint, professional service organizations have end-to-end, real-time visibility into the customer lifecycle from opportunity management and service delivery to invoicing and customer fulfillment. This paves the way for improved resource utilization, financial control and analysis, as well as increased customer satisfaction.

PSA: THE COMPLETE PICTURE

Services organizations maximize financial performance through the efficient and effective use of resources. This requires visibility into the performance of current work as well as the opportunity pipeline. Services executives need real-time visibility into the key metrics of a services organization: utilization, profitability and margin to properly forecast and drive business decisions.

Many professional services organizations find it difficult to achieve optimal efficiency across all aspects of the customer engagement because of:

LIMITED VISIBILITY INTO SERVICES OPERATIONS

You can't manage what you can't see. Disparate systems, disjointed processes and manual reporting methods supply only fragmented views into services operations, not the entire picture.

LACK OF PROCESS AUTOMATION

A breakdown in process leads to a breakdown in communication across the full cycle of a customer engagement.

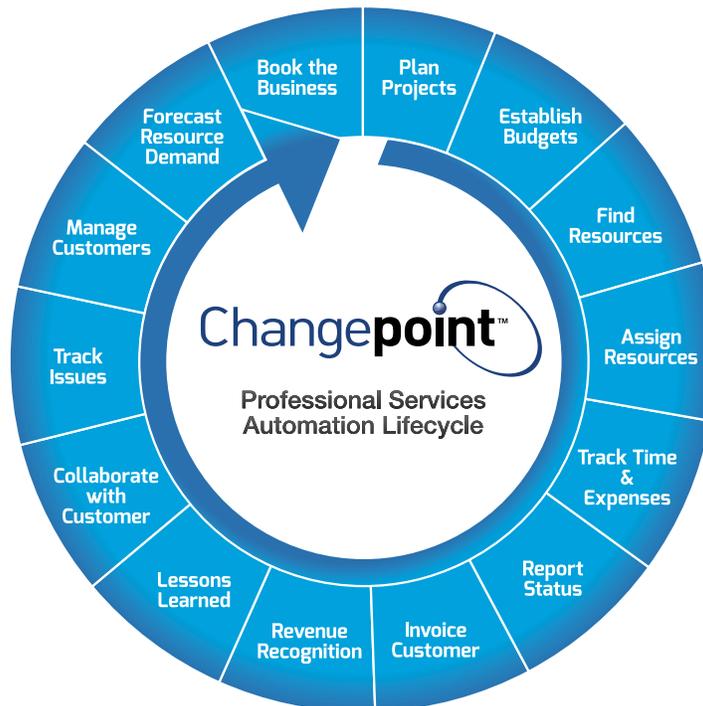
Organizations are left reacting to problems rather than preventing them. Poor project administration leads to unproductive staff, lost time, higher expenses and missed profitability.

POOR RESOURCE UTILIZATION

Poor pipeline visibility, ineffective scheduling capabilities and administratively intense processes make it tough to truly determine where and when to assign resources based on skill sets. Without a solution, services organizations run the risk of low resource productivity and less than expected profitability.

IMMATURE FINANCIAL MANAGEMENT

Many PSO's today face issues surrounding their financial maturity. With only 'line item' level visibility into budgets, services organizations often face budget overruns, putting contractual agreements in jeopardy. For other PSOs, the invoicing process is often disconnected project deliverables and engagement milestones, which can create friction in customer relationships.



OPPORTUNITY MANAGEMENT AND RESOURCE FORECASTING

Before committing to an engagement, you need to make certain your organization can deliver. Changepoint provides a structured process for analyzing, tracking and forecasting client opportunities and their requirements. It combines three key disciplines with dashboard reporting to better manage opportunities.

Pipeline Management: Changepoint provides a view — including pipeline forecasting and profitability analysis — into all service opportunities.

Resource Forecasting: The comprehensive resource management functionality of Changepoint incorporates resource forecasting at the pipeline stage and comprehensive demand and capacity management. This approach ensures you have the right resources at the right time should the opportunity close.

Engagement Management: Changepoint allows your services organization to define, automate and track all critical contract details to ensure invoicing runs smoothly. This includes fee schedules and billing rules, time and expense rules, and other contractual obligations..

MANAGE SERVICES ENGAGEMENTS

Once an opportunity has been secured, Changepoint provides a structure to make sure projects are completed on time and on budget:

Project Portfolio Management: Provides a view of work performance by portfolios such as key customers, product lines and delivery groups.

Project Management: Track the ongoing health/status of projects tied to a services engagement.

Resource Management: Assign and track internal and external resources more effectively.

Time and Expense Management: Streamline time and expense workflow to ensure submissions are made and approved on time, every time, while eliminating redundant data entry that leads to costly human errors and leaked billable time and expenses.

Mobility: Access real-time project, resource and product data on tablets and smartphones. Enter time and status updates, enter

expense line items and reports as well as including attachments, and participate in workflows.

Budgeting, Invoicing and Revenue Recognition: Flexible billing options, complete with sophisticated currency and tax-handling requirements, plus audit support, help you expedite invoicing, improve cash flow and report revenues consistently and accurately. Integrated budgeting at every stage of the customer lifecycle, improves financial management of projects and engagements.

Comprehensive Business Analytics: Embedded advanced business analytics provide a new level of insight into operational performance through real-time access to role-based dashboards highlighting key metrics such as revenue, cost and margin to measure operational success.

CUSTOMER SUPPORT AND SATISFACTION

Visibility into services engagements shouldn't end once the project is complete. Changepoint continues with visibility into client satisfaction. Client satisfaction is critical for repeat business, and Changepoint helps you ensure clients are satisfied.

Performance Management: In order to proactively manage their performance, employees require specific objectives and regular feedback on their personal performance against objectives. Individual and team-based scorecards show performance ratings based upon configurable metrics or customized metrics utilizing data from across the solution.

Survey Management: Use peer and customer feedback obtained through surveys in the performance evaluation process of individuals, customers and projects.

Customer Relationship Management: Build and maintain a solid customer base within a highly secure and collaborative portal. Changepoint's portal facilitates client self-service, request management, client feedback and a repository where industry-and-customer related data can be stored, managed and shared among key stakeholders.

Ongoing Support and Collaboration: Create a learning community where industry and customer-related knowledge is stored and can be easily searched for by key stakeholders through a customer portal.

ABOUT CHANGEPOINT

Changepoint manages critical customer business processes allowing technology services and IT teams to deliver more customer value, make smarter business decisions, and achieve new efficiencies, while operating with strong financial acumen. Recognized year over year as a market leader, Changepoint's professional services automation and project portfolio management software is relied upon by leading technology companies, and service focused IT organizations worldwide. Changepoint is headquartered in Toronto, Canada.

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