



Configure SuiteProjects Pro To Your Business Model, Not The Other Way Around

Are you still duplicating work or using manual processes?

Are your reports providing you with the right information?

Are you struggling with adoption by your users?

These are just a few of the signs your SuiteProjects Pro system may not be configured to meet your needs. SuiteProjects Pro is a leading PSA system for supporting your project-based business with superior features and functionality. Because of the vast capability within SuiteProjects Pro this poses a challenge to those who do not have experience with the software. At the same time, business operations experience is needed to understand how to configure the system to support your business model.

The Top Step Business Efficiency Assessment is designed to identify where the gaps are between your business process and the SuiteProjects Pro system configuration.

Our SuiteProjects Pro and business operations experienced consultant work closely with your team to fully understand your business model, what processes and tools are in place and how effective they are. At the end of this short two-week engagement, we provide you with recommended process and tools improvements along with the cost and benefit for implementing each change.

This valuable first step will arm you with the information to make the final decisions that will have the greatest impact towards achieving your goals.

Benefits of a Business Efficiency Assessment

- Independent review by PS business operations experts experienced in SuiteProjects Pro
- An actionable plan with cost/benefit for implementation
- Best practice discussions
- An SuiteProjects Pro system that works the way you do

“Because Top Step’s methodology focused on our business process first to understand how we would benefit from a best in class PSA tool, we were able to accelerate our original schedule to deploy the SuiteProjects Pro system.” — Howard Abrams, Empathy Lab

Our Process And What To Expect

Business Process Workshop

The Process Workshop provides a base understanding of your current business model. The focus is to capture how daily business operations are currently managed, understand the improvements or changes you plan to make and any known issues impacting your operations.

Operational Analysis

This phase entails:

- Identifying process changes that will be required to meet the business efficiency goals.
- Automation opportunities will be reviewed, and a matrix developed, which can be used to evaluate potential system changes.
- Cost/Benefit for implementation of identified changes will be calculated providing critical data for implementation decisions and budget for the project.

Business Efficiency Action Plan and Recommendations

The final phase of the project is presentation of the findings and recommendations for improvement to your key stakeholders. We will review the findings and recommended plan in a face-to-face presentation. By using this collaborative approach we can receive feedback and validate any assumptions that may have been made during the identification process.

The final result is an actionable plan based on your goals and priorities for achieving your business efficiency goals.



About TOP STEP

Top Step is a leader in optimizing business efficiency for Professional Services operations, dedicated to helping clients achieve their profitability goals while focusing on business growth. With extensive expertise in professional services business operations, professional services automation (PSA), and project management, Top Step has proudly served over 400 global organizations. Its commitment to excellence has earned recognition as “Best of the Best” by SPI Research and Oracle NetSuite for Exceptional OpenAir Product Expertise. Visit www.topstepllc.com to explore how Top Step can elevate your operational excellence.

