



Get Started Right With Experience And Expertise

So you have decided to implement SuiteProjects Pro, now how do you insure a successful and smooth implementation?

Making the decision to implement SuiteProjects Pro to gain visibility and control for your project-based business is only the first step. Implementation of SuiteProjects Pro requires an understanding of your operational and business model to ensure user adoption, efficient system use, and accurate information tracking and reporting. If you are a global operation your implementation must also be able to accommodate expansion to other countries and offices without impacting defined processes or data capture.

Top Step has over a decade of experience in deploying SuiteProjects Pro both locally and globally. Our consultants come from industries that leverage Professional Services Automation tools and have gained their experience through practical application, trial and error, and vendor interaction. We understand your business problems and processes/policies along with having a unique skill in interpreting your terminology into the SuiteProjects Pro product terminology. This bridges the communication gap that often times results in frustration and deployment milestone slips simply due to misunderstanding.

Top Step's methodology for SuiteProjects Pro Implementation has been refined and perfected through extensive real-world deployments. This, in combination with our SuiteProjects Pro know-how and our business operations experience we are 100% confident we can help you begin receiving value in your SuiteProjects Pro investment faster, and achieve a higher satisfaction and adoption of your new system.

The Benefits of SuiteProjects Pro Implementation Services

- Get SuiteProjects Pro Experts who have business operations experience
- A proven implementation blueprint that works for both local as well as global deployments
- Best practice discussions
- User training to ensure successful transition from your legacy system to the SuiteProjects Pro system
- A SuiteProjects Pro system that works the way you do

“Top Step's expertise in guiding us through this journey and helping us avoid mistakes that would have set us behind, was one that was appreciated by our entire team at Resource and one that was well worth the investment.” — Drew Sheppard, Executive Director of Operations, Resource

Our Process and What to Expect

Business Process Workshop

We focus on how you want to run the business before we recommend SuiteProjects Pro configurations and usage.

We will explore:

- Opportunity Management
- Client Management
- Project Management
- Resource Management
- Financial Management
- Current reports used within the organization

Detailed Design and Module Configuration

This will cover:

- Identification of SuiteProjects Pro modules relevant for your business
- Reporting needs and report definition

SuiteProjects Pro Integrations to Existing Systems

We understand who is responsible for information exchanges, what is needed, and when is the information required.

System Validation

We conduct a trial run to walk-through realistic system use scenarios. The benefit of this walk-through is to identify any cumbersome business processes and refine feature/field permissions based on types of resources to ensure compliance to business processes.

Data Migration

We identify historical and current data to load into the system then develop the data migration plan.

Training

Training may take the form of classroom, user guides, webinars, or email instructions depending upon the number of users, and what is best suited for your organization. Included are Time and Expense users, Project Managers, Finance, and an overall System Administrator.



Go Live and Verification of Month-End

We work closely with your team to conduct a go-live parallel run with your current system is conducted to allow a verification activity (usually month-end activities) before final cut-over to SuiteProjects Pro from the legacy system.

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 SuiteProject Pro Product Expertise. Visit www.topstepllc.com to explore how Top Step can elevate your operational excellence.

