

# Critical Success Factors to Automating Your Global Services Delivery

A white paper that outlines the key components to uniting a services organization across departments and regions.

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## Background

In today's economic situation, much has been made about the need to automate business processes to cut overhead costs and accelerate services to the marketplace. This can prove difficult for any organization due to a variety of mitigating factors including budget constraints, executive support, and unexpected changes to project scope. These issues manifest themselves exponentially when dealing with enterprise, multi-national corporations.

This need for automation is more important than ever. Over the past generation, we have seen a transformation in the value drivers of the world economy. Major companies have moved from focusing on higher product margins to driving increased margins and competitive differentiation through the use of "value added" services. This move has been highlighted in IBM's transformation from a product to services company and has been attempted and considered by an enormous variety of enterprises large and small.

With this shift in the world economy comes a need for a shift in the type of systems and processes that will drive business success. This article seeks to outline some of the keys to consider in beginning the journey to automate the global services delivery chain. It requires new partnerships, processes and an open mind to achieve success.

With operations across the map, global business automation is a high risk, high reward proposition. However, by understanding and implementing the following success factors, you can greatly increase not only the speed and efficiency of your initiative but also its return on investment (ROI).

## Have a Clear Vision and Strategy

It is much easier to reach your ultimate goal when you actually have an ultimate goal! Take the time from the beginning to lay out the manual processes that must be automated immediately and those that can wait. Create a "parking lot" to ensure that mission critical tasks are executed on time. It's easy to be distracted by secondary priorities. Focus on the 'must have' objectives and park all other requests until you have fulfilled the top priorities. By detailing a clear vision and strategy, the key decision makers will be on the same page with a common end result in mind.

## Ensure Alignment between Business and IT

It is highly likely that your automation initiative will involve the implementation of new tools such as a Professional Services Automation solution (PSA) as well as integration with existing business solutions. If this is the case, clear communication between business executives and your IT department is essential. It is no secret that these two groups often have different objectives and needs so strive for open dialogue to clearly explain the greater corporate goal. With everyone in the organization on the same page, you will hit your milestones on time and on budget.

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Clear communication with the IT department will also help to make clear that they are strategic partners in the effort to improve services delivery. With the advent of Software-as-a-Service (SaaS) solutions, IT's role has moved to a new strategic level. Line of business executives can “try and buy” solutions and IT can play an invaluable role in helping integrate new solutions into the overall enterprise footprint. This is an unprecedented time of change and growth in the ability of software to solve business needs and IT can be a key part of that solution.

### **Gain Executive Support**

Without C-Level support on various levels, your automation initiative will never get off the ground running. On the other hand, gaining executive sponsorship will maximize your success and return on investment.

#### **Funding**

Although automation of your services delivery will in time prove cost effective, it will require upfront costs. Now more than ever, the ability to clearly and concisely state the short and long term benefits to justify these costs will make or break your cause. Executives are metric driven individuals and a lack of concrete ROI figures will scuttle your initiative immediately. However, prove the business value of these costs and even the most conservative executives will have difficulty ignoring you.

#### **Motivation**

Automation of your global services delivery will require cooperation from every department. Due to complication, inconsistency, or a lack of scalability, current business processes will need to be replaced or retooled. You will need executive level support to get everyone in the organization behind your initiative. An automation tool is only as good as the manner in which it is used. C-Level motivation across your organization will drive user adoption and help ensure the viability of your initiative.

#### **Expectations**

So your executive team has given the green light for the purchase of a services automation tool. Now show them results. A concrete and rapid return on investment is the quickest way to ensure the success of your implementation. Clearly illustrating profit margin, reductions in overhead costs, and increased revenue will create a thirst for metrics that will keep your executives engaged and satisfied.

### **Process Alignment**

As I stated earlier, global business automation is a high risk, high reward proposition. It is a coordinated dance across regions, roles, and zones. Furthermore, services delivery is an increasingly integrated chain of processes that are intertwined and interrelated. If implementing services automation software, it is essential to leverage the vendor's consulting capabilities. They have an intimate knowledge of their software capabilities and have refined common processes to handle implementations of any size. For example, without proper consulting and strategy sessions, time and expense tracking may be scheduled to come online before projects are even set up in the system to track time and expense against. You will save time, money, and energy by taking the time to align your processes in a manner that allows for coordinated implementation across departments and geographical locations.

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Another key example of this relates to achieving appropriate business definitions. We take for granted in the manufacturing world a level of granularity to describe processes and parts that simply does not exist in the services world. Resolving questions around such items as how to define utilization, work schedules, standard rates and other items are always harder than they first appear. Typically, it is not because these concepts don't exist in the enterprise, but rather because they exist in so many different forms in the enterprise. Particularly, as enterprises have grown by acquisition, you will find that the exercise in defining and clarifying these definitions will be some of the most valuable—and most painful—work that can be done.

### **Project Execution**

Now that your plan is developed, follow it! Stick to your established milestones and stay focused on your end goal. Active involvement with a select group of capable and credible internal resources provides the best avenue for success. However, too many voices will impede the process. Less is more when it comes to deployments and having a centralized decision making body will pay dividends. Also, ensure that middle managers are involved during testing and training since they will most fully utilize the system. Finally, constant alignment between zones will help ensure that your automation initiative is coordinated and finishes on schedule.

### **Conclusion**

It is very difficult to make a case for a global overhaul of your services delivery in today's economy. However, automation of your core business processes will streamline your time to marketplace and eliminate revenue draining manual processes. Although every services business is different on a variety of levels, the above critical success factors provide a general plan that will guide you on the right path to success for the automation of your global services delivery.

### **About OpenAir**

OpenAir is the world's leading provider of Software-as-a-Service (SaaS) professional services automation software. Offering both Professional Services Automation (PSA) and Project Portfolio Management (PPM) solutions, OpenAir provides project-based organizations and firms the tools they need to grow their businesses quickly and profitably. Providing enterprise-level functionality for businesses of all sizes, OpenAir has more than 50,000 active users across 350 world class firms utilizing the software to better capture billable time, manage projects and resources and bill customers. Coupled with a team of highly experienced consultants from some of the world's leading services firms, OpenAir PSA and OpenAir PPM drive higher profits through improved utilization, visibility and data collection. To learn more or schedule a demo, please visit [www.openair.com](http://www.openair.com).

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