

HumanConcepts Goes Global with FinancialForce PSA

Success Story

HumanConcepts is a leading provider of solutions for understanding the current workforce and facilitating organizational change of all types, including growth, rightsizing, and reorganization. The company is headquartered in Sausalito, California, with clients located around the world.

HumanConcepts is a rapidly growing company with clients and projects based in the US, Germany, and the UK with plans to expand further. To manage and grow its business, the company wanted to capture accurate and current information on all aspects of its professional services business within each geographical area. They also needed to continue to deliver consistent, high quality service to its customers during the expansion and beyond.

Integration is key

Multiple, disparate business systems with different technology processes and platforms were beginning to create obstacles to expansion. HumanConcepts realized that it needed to replace its existing professional services solution, which had become too cumbersome to work with and could not integrate seamlessly with Salesforce CRM and its legacy financials system. If the three systems were integrated, information on projects would be easily accessible and always current.

“We needed a system that was integrated with Salesforce CRM and accounting, so that we could get a clear view into project status,” said Peter Robson, Professional Services Manager at HumanConcepts. “Visibility into the data within CRM, financials, and professional services was critical to providing executives with a clear and up-to-the-minute status of projects and support informed business decisions.”

Improved project planning through 360° visibility

The sales team’s inability to access the current status of implementations at customer sites was another challenge. The sales team needed the information to help move implementations along or address any client concerns before they impacted the project goals. Additionally, time tracking, billing and accounting were very manual. Prior to FinancialForce, a project manager was responsible for entering the time cards for all of the professional service consultants. Uploading time would happen only once a month. Valuable information on project workloads and resources was not in sync, so project leaders did not have a complete, real time view of engagements.

To enable its growth strategy, HumanConcepts chose FinancialForce Professional Services Automation to replace its existing system because it was on the Force.com platform and could seamlessly integrate with their existing accounting system and Salesforce CRM.

Customer Profile

Company:

HumanConcepts

Application:

FinancialForce PSA

URL:

www.humanconcepts.com

Company Size:

140 employees

Industry:

Software

Results:

- The HumanConcepts team can now focus more on client work than internal processes.
- Consultants are able to login simultaneously to the system to upload and keep track of their time and project notes, saving valuable time and getting invoices out more quickly.
- With real time visibility, projects are now closed an average of 30% faster, which has helped the company more effectively allocate resources and grow globally.

“It takes us half the time to obtain current and forecasting data from FinancialForce PSA versus our previous system.”

Benefits are quickly realised

The company quickly started to see benefits of a single integrated environment. Not only is the new system easy to use, but it has rapidly enabled new efficiencies that help the HumanConcepts team focus more on client work than internal processes. Professional Services Consultants are able to login simultaneously to the system to upload and keep track of their time and project notes, saving valuable time. Timecards were entered by each consultant and done daily versus monthly in the previous system. The new level of integration means the process flow for approvals is much more efficient now. For example, timecard approvals are much easier, which means the finance team can get invoices out more quickly.

The integrated system also helps keep HumanConcepts' leadership on top of their business. Executives can view the current state of projects in real-time and that has helped with visibility into the business. Sales executives can now jump in and assist if ever a customer question arises. Up-to-the-minute information presented in a drill down manner on the dashboards allows executives to view high level details or drill down by region, by month, by customer, or by prospects in the pipeline.

“Having utilization numbers by pipeline helps us make informed decisions for the good of the business. We now close projects an average of 30% faster, which has helped the company allocate resources properly and grow globally,” added Robson. Having both back and front office systems running in a single cloud environment on the Force.com platform has simplified internal support and provides Human Concepts' executives the visibility into existing projects necessary to make smarter business decisions. As the company grows, it plans to implement the utilization schedule functionality in FinancialForce Professional Services to get an even closer view of each consultant's workload.

“The ability to view all the data from FinancialForce Professional Services, Salesforce CRM and our accounting system quickly and easily is invaluable.”

“With FinancialForce PSA and Salesforce CRM we can now see how many licenses have been sold and how much additional Professional Services work is coming down the pipeline.”

“Consultants previously would only login at the end of the month to enter in their time. Accuracy of the information is lost when you delay entering data. Now we are logging time on a weekly or even daily basis.”

“With the dashboards, we have visibility into the utilization numbers by pipeline and by region, which is really helpful for planning our global strategy.”