

BeyondTrust – Improving Professional Services with FinancialForce



Industry: Software / Cybersecurity

Company Size: Large

Headquarters: Atlanta, GA

Products Used: Professional Services Automation

Key benefits:

- ✓ 20% Higher utilization globally
- ✓ Real-time visibility
- ✓ Among the lowest voluntary attrition across company



Disjointed operations and project management

BeyondTrust is the worldwide leader in Privileged Access Management (PAM), trusted by 20,000 customers, including 70 percent of the Fortune 500. BeyondTrust empowers organizations to secure and manage their entire universe of privileges across traditional, cloud, and hybrid environments.

After a series of acquisitions and mergers, BeyondTrust found itself with four professional services organizations. Two were using FinancialForce Professional Services Automation (PSA) platforms, one used a homegrown system, and the other used spreadsheets. To ensure streamlined operations, satisfy customer expectations, and close projects as quickly as possible so it could recognize revenue, the company needed to unite professional services on a single application platform.

“The way FinancialForce PSA works with Salesforce empowers me to configure it rather than relying on external expertise, which is a huge advantage.”

Sean Cashin
Vice President, Customer Success and Services
BeyondTrust

Driving Operational Consistency and Maturity

By capitalizing on the Salesforce native FinancialForce Professional Services Automation solution, BeyondTrust can ensure that the Professional Services team is optimized and has the necessary visibility into projects.



Gaining a single source of truth

As a purpose-built solution native to Salesforce, FinancialForce PSA enables BeyondTrust to use Salesforce as its single source of project truth and take full advantage of existing technology investments. These capabilities have made it possible for the company to enable consistency across projects and improve its operational maturity and resource utilization metrics.



Empowering customer-facing employees

Within FinancialForce PSA, project managers can easily schedule engineers based on skillset, availability, and geography. Customer success managers are automatically alerted to proactively reach out to the customer when a project manager flags a project. Engineers appreciate the improved visibility of their assignments and the ability to easily submit timesheets.



Details **Resources** Skills & Certifications Project Task Assignments Est Vs Actuals

Pin Compare Manage Schedule Hold Assign

Name	Status	% Availab...	Rank	Resource ...	Region	Practice	% Utilizat...	Mailing City	Default C...
<input type="radio"/> Tim Marklein		59	1	Consultant			85.00	Portland	USD 85.0
<input type="radio"/> Preston Mayo		91	2	Consultant			85.00	Oakland	USD 85.0
<input type="radio"/> Samantha Lewis		6	3	Consultant			85.00	San Mateo	USD 85.0
<input type="radio"/> Doug Douglas		5	4	Consultant			95.00	New York	USD 95.0
<input type="radio"/> Lisa Medley		81	5	Consultant			85.00	Seattle	USD 100.0
<input type="radio"/> Pam Practice		71	6	Consultant			95.00	Tampa	USD 75.0
<input type="radio"/> Jim Hilligoss		79	7	Consultant			85.00	San Mateo	USD 85.0
<input type="radio"/> Ed Smith		9	8	Consultant			85.00	London	GBP 95.0
<input type="radio"/> Anne Brogan		4	9	Consultant			95.00	Manchester	GBP 125.0
<input type="radio"/> Brad Tan		-33	10	Consultant			85.00	Sydney	AUD 65.0
<input type="radio"/> Pjotter Pitka		50	11	Consultant			85.00	Rotterdam	EUR 140.0
<input type="radio"/> Ahmet Arva		50	12	Consultant			85.00	London	GBP 110.0

Enabling continuous improvements

Because FinancialForce PSA enables BeyondTrust to build customer-centric activities into project templates, the company can ensure it captures feedback and measures customer sentiment. This timely insight provides the Professional Services team with the information it needs to deliver better outcomes.

Vision ahead

Going forward, BeyondTrust anticipates gaining even more insight into its project metrics via FinancialForce PSA. It also plans to take further advantage of FinancialForce PSA to improve how it operates and delivers projects. By automating more routine tasks and leveraging the ability to integrate additional tools such as Calendly with FinancialForce PSA, project managers will have more time to focus on the activities requiring their expertise and judgment instead of administrative tasks. Automation alone will enable the company to reduce project management overlay by 5% and collectively save project managers about 40 hours per week.

Learn more

www.financialforce.com