Bridging the delivery gap: How to unify your sales and services organizations

This whitepaper details for service delivery managers, project managers and executive managers how Clarizen’s integration with Salesforce CRM supports and promotes professional service best practices, and helps bridge the delivery gap that companies face when their commercial teams and service delivery teams work in separate systems.

What is the problem today?
The delivery gap: a condition suffered by professional services organizations internal teams working with disparate systems for CRM, ERP, project management, timesheets and financial operations.

Services organizations must accurately track engagement profitability, effectiveness of the service delivery organization, sales team alignment and the value of key account relationships.

Delivery gap symptoms include communication problems between teams and impaired visibility into service delivery performance caused by a lack of real-time information that can lead to slow reaction times, inefficient resource utilization and lost revenue.

Who does the problem impact?
The delivery gap impacts several areas of the business.

- **Sales** account managers need to focus on winning new business and managing customer relationships. The delivery gap means the sales team lacks visibility into the status of service delivery and implementation once they turn over a sale. This leaves them chasing project managers for progress updates and to understand how successfully they are being delivered. When there are issues the delivery gap contributes to sub-optimal responsiveness based on poor information.

- **Services delivery** teams need good predictability and visibility for incoming projects to be able to source human and other resources. Lack of insight into incoming deal flow and the resulting impact on delivery teams means longer project lead times, hasty scoping, sub-optimal resource utilization and overloading of project managers, which affects the ability to deliver projects on time and on budget.

- **Project managers** suffer from limited visibility into upcoming projects, making it far more difficult to assign and balance resource loads.

- **Finance teams** need to manage the billing and collection cycle once milestones and projects have been successfully completed. Poor visibility of milestone completion, billable time and expenses can result in manual work and poorly-coordinated invoicing, which may ultimately translate into cashflow issues.

- **Executive management** needs a central place to cross analyze and interpret business performance. Services organizations must accurately track engagement profitability, effectiveness of the service delivery organization, sales team alignment and the value of key account relationships.

- **Your customers** whose business and operations frequently depend heavily on your ability to respond accurately and in a timely manner.
Clarizen and Salesforce bridge the gap

Work execution is the natural evolution of project management. Organizations need to do more than plan and manage: they need to collaborate in context, understand employee workload requirements and capacity, and analyze the interdependency between different tasks, jobs and projects. Work execution encapsulates the entire lifecycle of a project, making the project come alive and stay alive from inception to delivery. Perhaps most importantly, work execution defines the ability to identify the work that will make the biggest difference to your organization, and build a repeatable process to ensure consistent delivery.

Clarizen’s work execution platform goes beyond project management to help services organizations improve pipeline visibility, improve delivery efficiency and ensure maximum resource utilization.

Clarizen’s integration with Salesforce works out of the box to enable effective and realtime handover of new engagements into the services organization, ongoing visibility from their desired application interface (Salesforce or Clarizen) for both teams, and the ability to track key performance indicators to ensure ongoing success.

Bridging the delivery gap with automated information flow

Clarizen Overview

Clarizen combines core project management functions with key communication tools like email and chat, creating a collaborative environment that fosters team productivity. Key features include project planning, scheduling, resource management, budget tracking, time and expenses, issue tracking, reporting and more. Clarizen’s SaaS-based interface is easy to learn and use for all team members, providing customized dashboards that give managers give visibility and control over their projects, and give project resources the ability to manage their tasks and update progress in realtime.

Clarizen has partnered with Salesforce, as well as other industry-leading companies to build a complete best-of-breed ecosystem for project management.

Clarizen-Salesforce Integration

The integration between Clarizen and Salesforce provides deep connectivity between the two applications, presenting information natively to the users of each app. For instance, sales managers can now view project delivery information in their Salesforce views and dashboards, while project managers and service teams can leverage Clarizen to see the pipeline for upcoming projects and better plan for resources and delivery.

As the probability for deal closure increases, sales people can trigger the creation of a project via Salesforce. Clarizen and the delivery manager receive this request, and can produce a statement of work, begin resource planning (both human as well as non-people resources) and scheduling, while communicating in context via Chatter and Clarizen discussions.

Once a deal is closed and has been transferred to the services team for execution, the service team can provide their project manager status updates, which Clarizen passes through to Salesforce. This keeps the salesperson up to date on progress, and paves the way for better client communication and timing for upsell conversations.

As milestones are completed, finance can automatically be notified to trigger invoicing and billing cycles. If issues and new requests arise during the course of the project, sales can submit and track the status of these issues directly from Salesforce, while the Support team is able to manage and update progress in Clarizen. In addition, Sales and other team members in Salesforce can log time and expenses related to the opportunities and service delivery projects, giving operations teams greater and faster insights into the true cost and profitability of projects.

Lastly, project managers and executive management can easily report on a variety of KPIs and metrics for the entire portfolio of projects, both from within Salesforce or from Clarizen directly, so they can quickly identify problems, and create a platform for repeatable success.
The flow of information for a typical services organization:

Benefits of Clarizen-Salesforce integrations
Clarizen-Salesforce integration joins formerly disparate teams, and provides even broader benefits to the organization as a whole.

Benefits for sales teams
Account teams can easily initiate new projects from templates and track the progress of their delivery directly from within Salesforce, improving their ability to update their customers and reducing communication gaps between sales and service teams.

Salespeople can also initiate a draft “shell” projects from Salesforce to be scoped out further in Clarizen, so they can provide a realistic, well scoped statement of work to their prospects — ideally giving them a competitive advantage in the sales cycle.

All teams can communicate seamlessly in context, in realtime and on record via Chatter to and from Clarizen so that all related conversations are available for future reference and team members working in the separate systems enjoy full visibility.

Organizations with repeatable services offerings can automate project creation, leveraging Clarizen’s simple business rules wizard. For instance, a rule could be set to trigger a new project when a sales opportunity reaches 85% probability to close, though any criteria in Salesforce Opportunities, accounts, campaigns, contracts, or indeed any standard or custom Salesforce object can be used as a trigger. This automation reduces the manual work of project creation and ensures a smooth and consistent handover from and collaboration with sales and service delivery.

Account managers can see the real-time status of each of their customers’ projects via vital KPIs and a delivery timeline roadmap, improving their customer service, reducing calls to service managers for status updates and increasing their visibility for upsell opportunities. All Clarizen projects, requests, issues, milestones and any other objects are also Salesforce Chatter-enabled, so salespeople can see relevant updates directly in their activity streams.
Clarizen project roadmap
The Clarizen project roadmap is a unique and accessible widget that can be displayed in Salesforce, giving immediate, visual feedback on Clarizen project status. At a glance, viewers can see target delivery dates, milestones, and whether a project is on or off track.

Benefits for service delivery teams
Service teams enjoy increased visibility into upcoming project pipeline, so they can better predict revenue as well as required resources. This advance notice gives a service manager more time to find the right resources, and to ensure the project team gets all the relevant information they need from the opportunity to assist with accurate scoping.

Benefits for customer helpdesks
Issues are typically used in two ways. An issue can be created and linked to a specific case, account or opportunity, or the creation of an issue can trigger a project in Clarizen to resolve it. When a project is created to resolve a customer issue, its progress can be monitored from Salesforce as with any other Clarizen Project, ensuring that accurate and up to date information can be communicated to the customer.

Benefits for financial operations
Clarizen’s budget management module collects and calculates financial indicators from each task, milestone or project as a whole, and aggregates approved time and expense reports from the resources (employees, contractors, etc.) to generate essential KPIs like cost performance index, actual cost and profitability, as well as show whether the project is on budget.

With Clarizen progress reporting, time tracking and expense sheets can generate real-time financial metrics that are visible in Salesforce such as billable hours per milestone, billable expenses and earned value KPIs.

Service engagements are typically invoiced at completion of key milestones. Automatic synchronization of this data in Salesforce reduces manual work and enables integration with Salesforce-based finance and accounting solutions for billing by milestone.

Benefits for executive management
Clarizen’s Salesforce integration includes three best practice dashboards which display key performance indicators for executive management, financial management and project management teams to monitor the health of the projects being delivered and the delivery organization as a whole.

These reports are visible in Salesforce to provide a single reporting and dashboard repository for service delivery to be used alongside other management reports in one familiar interface. The reports and dashboards can be further customized to show the indicators most used by your organization.

Some examples of the reports include:

1. Project delivery funnel by project state
2. Monthly project delivery costs
3. Project profitability by project type and by account
4. Actual cost vs profitability
5. Projects sold by type
6. Expected revenue by project type
7. Types of projects are most likely to run over budget
8. Which projects are running off schedule?
9. Projects with the most open issues
10. Resource utilization rates
11. Billable hours
12. Project manager load
Advantages of Clarizen’s Salesforce integration

Not all AppExchange partners are created equal. There are many different ways to integrate with Salesforce and Clarizen has made significant investment to ensure that joint customers benefit from the smoothest possible user experience and the greatest flexibility.

Native Salesforce objects

Clarizen projects, milestones, issues and resources are native Salesforce objects, giving you greater flexibility and customization possibilities than alternative solutions. Anyone with basic Salesforce administrator skills can easily map data between Salesforce and Clarizen objects using standard formula fields and workflow rules to streamline workflow processes and reporting on projects and issues.

Real-time updates

A real-time sync ensures that users are getting the most up to date information any time records are viewed in Salesforce or when Chatter threads are updated in Salesforce, or relevant discussions in Clarizen. In addition to the real-time project data for account managers, the whole project portfolio is automatically updated twice a day with a full update to ensure accurate reporting.

Fully customizable display

The integration provides a rich set of data from Clarizen projects and milestones. Additional standard or custom objects and fields for projects, milestones, issues and resources can be easily mapped into Salesforce (without any programming) to support your specific business requirements.

Best practice reports

Clarizen allows you to create mirrored Salesforce objects that sync with the parallel objects in Clarizen, or you can trigger and sync actions of any other Salesforce object, giving you greater flexibility and customization possibilities than alternative solutions. Anyone with basic Salesforce administrator skills can easily map data between Salesforce and Clarizen objects using the integration setup screens.

Summary

Clarizen’s Salesforce integration helps eliminate the execution gap by bringing sales, service delivery and support organizations together. Clarizen’s robust integration can speed your service delivery, improve your sales process, and give you far better reporting tools to apprise management of your progress.

If you’d like to learn more about the Clarizen-Salesforce integration, visit the Apps Marketplace.