



3 ways to  
automate your  
business more  
effectively

# CHOOSING THE RIGHT BUSINESS AND PROFESSIONAL SERVICES AUTOMATION SOLUTION



For business and professional services (BPS) firms, automation helps to increase efficiency, productivity and utilization of the primary source of revenue: people. The more you can maximize the utilization of each employee and the easier you make it to manage your workforce, the more billable revenue you can generate. In addition, by automating time-consuming, repetitive tasks such as time entry, you can significantly improve the employee experience, creating a more engaged and loyal workforce.

When looking for solutions, [automation](#) is often looked at as a way to solve a specific business problem with software. By taking a more holistic, systemic approach, however, you can implement a business automation solution that addresses more than a single problem or use case to extend automation's benefits across your organization.

When exploring business automation, here are three ways it can benefit your organization—depending on your BPS sector.



## 1. Focus on improving employee utilization.

An integrated professional service [automation](#) solution (PSA) can help you improve the utilization of your people by allowing you to holistically view their client project assignments so you know which resources and skills are available for project assignments. PSA solutions are designed to assist professionals with resource management for client projects and utilization rate management for billable staff. These solutions tie together your financial, HR and project management areas to streamline the journey from operating a cost center to moving to a profit center.

Several of the key benefits of a PSA solution include:

### **YOUR COMPANY**

- Ability to secure strategic clients via the right talent
- Proactive client management, minimizing white space, improving project margins and reducing the risk for on-time/on-budget projects

### **YOUR EMPLOYEES**

- Engage the right resources at the right time to the right clients to reduce overload/underload for employees
- Increase project visibility across the firm
- Increase alignment of opportunities and resource skillsets

### **YOUR CLIENTS**

- Increase odds of hitting implementation timelines and expectations → time to value
- De-risk project issues and increase chances for success
- Increase client satisfaction due to more responsiveness and improved skillset match to project needs

By having the full insight into your most valuable resource, you'll be able to increase employee utilization and reduce the need to add expensive headcount.

# Automation Solutions:

- Robotic Process Automation
- Risk Management Process Automation
- ERP Risk and Controls
- ServiceNow
- Auditor Assistant: Internal Audit Automation
- Automation Anywhere
- BlackLine Services
- Dynamics 365 Project Service Automation



## 2. Improve your field services performance.

If your business provides service to other organizations, an automated field services solution can help your people work smarter in the field by helping them be better prepared. Field service management can help automate key processes like auto-populating work order forms, providing status updates to customers, dispatching, monitoring assets and scheduling routine maintenance of essential machinery. In addition, an automated solution can determine which tools and parts a technician may need for specific projects, reducing the risk that they'll arrive at a customer's location without the right parts to complete the job. Integrated with other automation solutions such as GPS, a field service solution can optimize resource schedules, reducing travel time and allowing more time in billable work.

Not only does an automated field services solution help technicians do their jobs more efficiently and effectively—without unnecessary frustration or time wasted—it also improves the customer experience and customer satisfaction by increasing the percentage of service orders that are fixed on the first visit, eliminating the need to schedule a follow-up appointment.



## 3. Optimize the finance department.

By incorporating automation into your finance function, you can help your finance team focus on value-driven processes and activities. The CFO's role is to enable the enterprise to effectively execute its strategic vision by providing a high-performing finance function that integrates operations, finance, accounting, performance measurement, risk management and reporting.

Implementing best-fit automation solutions and technologies delivers a digitally-enabled and agile finance department. Automating standard functions, such as the order-to-cash process, reduces errors and delays with integrated billing and revenue recognition and can more effectively manage cash flow. Automating the procure-to-pay cycle streamlines the process by using digital workflows for requisition, purchase orders and invoice processes. Overall, automation solutions improve the reporting process by providing a quality financial close process and delivering a more robust and timely report and analytical dashboard.



## Learn more about our automation solutions for BPS companies.

RSM brings dedicated industry professionals who are passionate about working collaboratively with you to deliver innovative automation solutions from leading providers like NetSuite, Microsoft, SalesForce, Kantata, Blackline and OpenAir.

Our focus is to understand your business challenges and, leveraging our BPS experience, create tailored solutions that extend the benefits of automation across your entire organization.

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