



# Strata Information Group Implements Professional Services Automation To Improve Efficiency Of Their Business Operations

## Background

For more than 28 years, Strata Information Group (SIG) has been supporting the efforts of colleges and universities nationwide to manage information technology in order to improve services for their faculty, staff and students. SIG provides a wide-range of services including enterprise system acquisition, ERP and software implementation, assessment and revitalization services

## The Problem

SIG has built a large client base over the past 28 years by focusing on delivering exceptional service to their clients. Business operations such as time-and-expense entry, scheduling resources, managing projects, and invoicing were being done in spreadsheets and multiple systems. This made it difficult to quickly assess the financial health of projects and to be able to forecast resource availability for future projects with much precision. "The demand for our services has grown significantly. We send out nearly 200 invoices monthly which is very time-consuming using manual methods. We wanted to optimize the back-end operations so that our service delivery continued to meet or exceed client expectations. We believe the back-end operations create an important part of the experience for our customers," said Kathryn Silva, SIG's Financial Systems Coordinator.

To better manage their business operations and obtain real-time insight into their projects, SIG made a decision to implement a Professional Services Automation (PSA) solution using NetSuite OpenAir. Their objectives were to:

- Improve time and expense entry

## The Results

- Dramatically reduced invoice-to-payment from 30 to 10 days for many customers
- Expense entry is no longer a duplicative process
- Nearly 20K of annual unaccounted for expenses have been eliminated
- Greatly improved monitoring budgets of current projects including early notification of potential over-runs
- Enhanced capabilities to utilize metrics in evaluating business performance
- Improved visibility into employee performance
- Achieving a 97% compliancy rate for timely reporting of time and expenses



“... When [TOP Step] started their conversations with us talking about business process, the same starting point we use with our clients, we knew they were the right fit for us.”

- Reduce time spent for invoicing and billing
- Gain insight into the financial health of projects
- Better manage unique contract and billing rules for each customer
- Improve visibility into resource availability

### The Solution

SIG partnered with TOP Step Consulting for the implementation of NetSuite OpenAir’s PSA system. TOP Step Consulting was chosen due to their reputation in the Professional Services industry and their range of experience with OpenAir. “TOP Step Consulting understood our business needs. When they started their conversations with us talking about business process, the same starting point we use with our clients, we knew they were the right fit for us,” said Silva.

The implementation project began the first quarter of 2014. In eight months, SIG was live with their new PSA solution. TOP Step Consulting’s input and guidance were key to the implementation, helping SIG understand what features and configuration of OpenAir to use based on their unique needs. “TOP Step educated, supported, and mentored us throughout the process,” says Silva. “When we went live with OpenAir, the lead team was in a solid position to handle both the initial training as well as the inevitable questions and issues that pop up in the first days of go-live. TOP Step empowered us with the knowledge we needed to be successful and they continue to be a reliable resource. TOP Step has a deep passion and enthusiasm to help businesses succeed. We are continuing to learn from the educational webinars and updates they provide as well as participating in the OpenAir User Groups that TOP Step supports in our region.”

### The Results

The results were immediate. SIG experienced many exciting ‘firsts’ as well as some very tangible time and cost savings with the OpenAir PSA implementation and guidance of TOP Step Consulting.

- The manual process of preparing, approving and mailing invoices was eliminated resulting in significant time and cost savings. By automating this process, SIG was able to reduce the invoice-to-payment cycle from 1 month to 10 days.



“The results achieved from implementation were immediate and significant in terms of time and money saved.”

- Expense entry is no longer a duplicative process – expenses are received into OpenAir and exported directly to the accounting system for reconciliation and payment. This saves hours of data entry each month manually entering up to 1000 lines of data!
- Expense processing time has been reduced, and nearly \$20K of annual unaccounted for expenses have been eliminated.
- Everyone in the company can see the same schedule in real-time. SIG is now utilizing the schedule to forecast the entire project lifecycle, including the future expense impact on the overall project budgets.
- Each consultant can now see their individual contributions to any project, which is improving accountability. Project Managers are empowering the consulting team with responsibility for time tracking on the projects.
- The response to the PSA system is overwhelmingly positive. SIG has been able to achieve a 97% compliance rate with timely reporting of time and expenses.

“We are extremely excited about the time savings we have gained. This is giving us big downstream benefits in terms of cost and ability to telescope into what is going on and where we can continue to improve how we run our consulting practice,” says Silva. “TOP Step Consulting has been a wonderful partner in our journey to help us integrate OpenAir into our business. The results achieved from implementation were immediate and significant in terms of time and money saved.”

With the new PSA system in place and TOP Step Consulting’s guidance and expertise, SIG is optimistic that they will continue to realize increasing benefits over time.

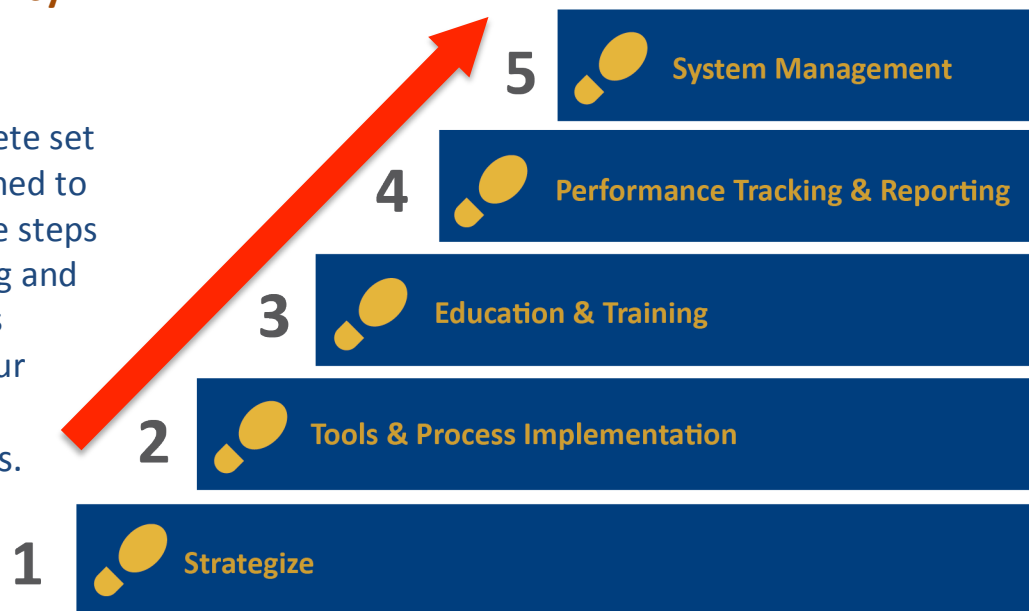


## Tools, Operations, Process...

### Steps to Professional Services Efficiency

#### STEPS to Professional Services Efficiency

STEPS is a complete set of services designed to focus on five core steps towards maturing and creating business efficiencies in your Professional Services Business.



#### About TOP Step Consulting, LLC

TOP Step Consulting improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business. Our experts have extensive experience in professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research for a sixth consecutive year.

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