

Breaking Silos: Aligning Strategy, Services, and Success in Professional Services

Managing Professional Services (PS), Customer Success (CS), and New Product Development (NPD) is tough. The biggest problem? A disconnect between **strategy** and **execution**. It's not about finding the right tools for PS or CS. It's about aligning your entire strategy to drive real success.

Success Starts Way Upstream

The journey to success doesn't begin with delivery. It starts way upstream—when you're deciding what to invest in and why. Are you considering how those decisions will impact **customer success**, **service efficiency**, **retention**, and ultimately, your **bottom-line revenue growth**??

A lot of companies still make decisions for PS and CS in silos, separated from the overall strategic plan. But here's the truth: if your strategy isn't linked to how your services and products perform, you'll face delays, inefficiencies, and missed opportunities.

Think about your PS teams. They're not just solving problems or issuing fixes—they're constantly managing customer challenges, addressing concerns, and reconciling issues, often in a reactive, firefighting mode. They're part of a bigger picture that includes **corporate strategies**, **new product development**, and **customer success**. For your company to succeed, these areas need to work together.

The Bigger Picture: Aligning Strategy, Services, and Success

Here's where many companies stumble. They're looking for a PSA (Professional Services Automation) solution, but that may only bring siloed value. What you really need is a way to bridge the gap between **strategy** and **execution**. You need to break down silos and connect everything—from corporate goals and ideas to the final delivery.




Imagine having a system that ties decisions about product development to outcomes in PS and CS. You'd be able to track KPIs from PS back to key decisions on **investments**, **features**, and **timing**.

And this isn't just about cutting costs. Today, with everything in the cloud, managing separate systems for each function (SPM, NPD, PSA, CS) adds unnecessary complexity. Now imagine handling all of it in **one unified platform**.



A New Approach for the Future

It's time to think strategically. Instead of focusing on separate tools for separate tasks, focus on connecting all parts of your business. With the right platform, you can:

-  **Break down data silos** and get real-time visibility from strategy to execution.
-  **Speed up decision-making** by making sure product features and service goals align.
-  **Cut costs** by streamlining your tools, investing in one platform instead of juggling multiple solutions.

This shift will help you move from maintaining the status quo to driving real business growth. It's not just about getting better tools; it's about making **smarter decisions** from the start.

What Happens Next?

You surpass revenue goals, see more efficiency, and more success. Why? Because you're making the right decisions upstream and seeing them pay off downstream.

Ready to stop operating in silos? It's time to start thinking strategically and look for a solution that connects the dots.



Cut Inefficiencies by 75%

A global leader in energy control solutions, faced major inefficiencies as siloed teams struggled with delays and duplicated efforts. After switching to a unified platform, they reduced inefficiencies by 75%, eliminating wasted time and disconnected data. Now, teams focus on delivering value and meeting industry demands with greater precision and speed.



18% More Projects with the Same Team

In the beverage industry, growth was a priority, but adding staff wasn't an option. The challenge was to boost output without increasing the team. With a unified platform, they saw an 18% increase in the number of projects completed—with the same workforce. By streamlining processes and connecting their strategy to execution, they managed to get more done with the resources they already had.



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