# SCALING SERVICES
## STRATEGY, STRUCTURE & EXECUTION

SDA
services delivery alliance

# LEVEL 2: DEFINED - GOALS

SDA
services delivery alliance
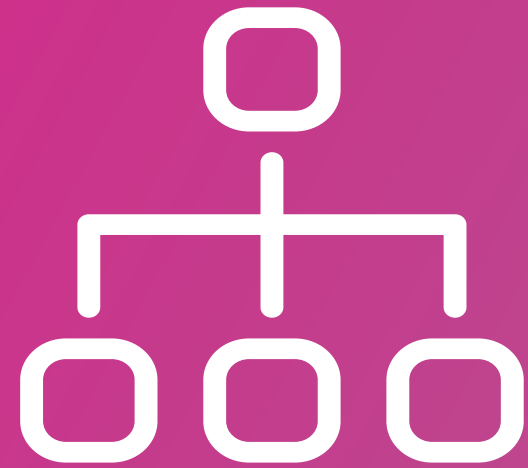
## Expansion

Value Added Services team to build out additional services beyond onboarding

Fast growth into new markets ie: geographical and upmarket

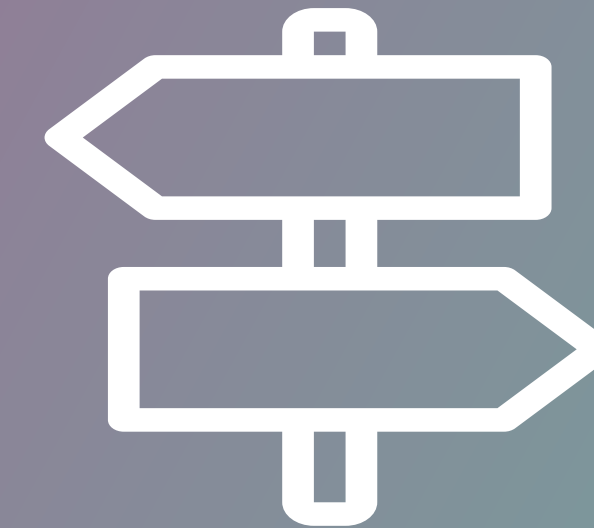Building PMO

## Utilization Focus

New time tracking/ PSA implementation

Billable Time Targets

## Standardize

Clarity of responsibilities by delivery team

Focus on standardization of delivery

Develop GTM engine for new services

# LEVEL 2 - DEFINED
# ORG CHART



*Global VP Professional Services*

**Project Managers**

*Senior Director, Value Added Services*

*Director, Onboarding NA*

*Director, Onboarding EMEA*

**Specialized Consultants**

**MGRs**

**MGR**

**Functional Consultants**

**Technical Consultants**

**Functional Consultants**

**Technical Consultants**

SDA
services delivery alliance

# LEVEL 2: SERVICE OFFERINGS
## Defined Structure

## Divisional Design

**85%**
Onboarding Services

**15%**
Other/Ad Hoc Services

**NEW**
Value Added Services

SDA
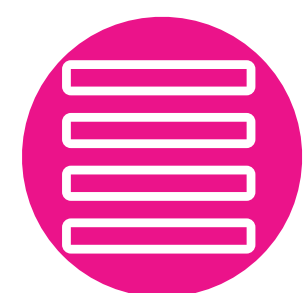services delivery alliance

# SERVICES EXECUTION
## A new way to track value in PS

**Quality**

Management and visibility to customer projects

**Standardization**

New, improved project templates for each service enabled with PSA

**Utilization**

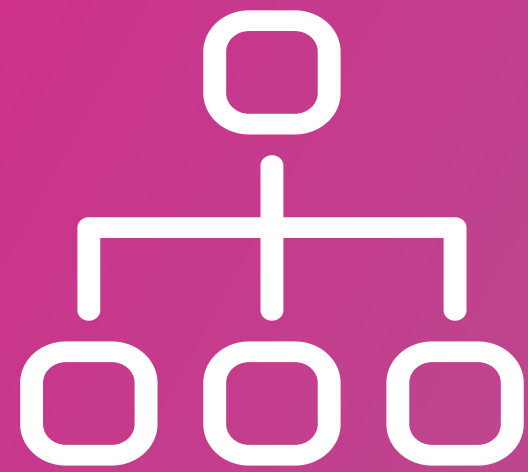Focus on accurate time tracking behaviors to drive billable Utilization targets

**Innovation**

Value Added Services (VAS) in design to fit into service models and make repeatable

SDA
services delivery alliance

# LEVEL 3: REPEATABLE - GOALS

SDA
services delivery alliance

## Scalable

Scale to Products

Scale to Segments

Scale to Services

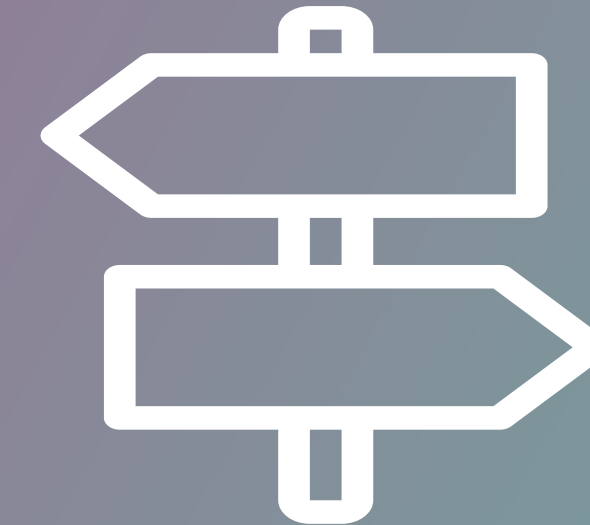Scale Geographically
+more as needed

## Focused Development

Attrition due to lack of growth opportunities

Skills development based on role; clear career pathing

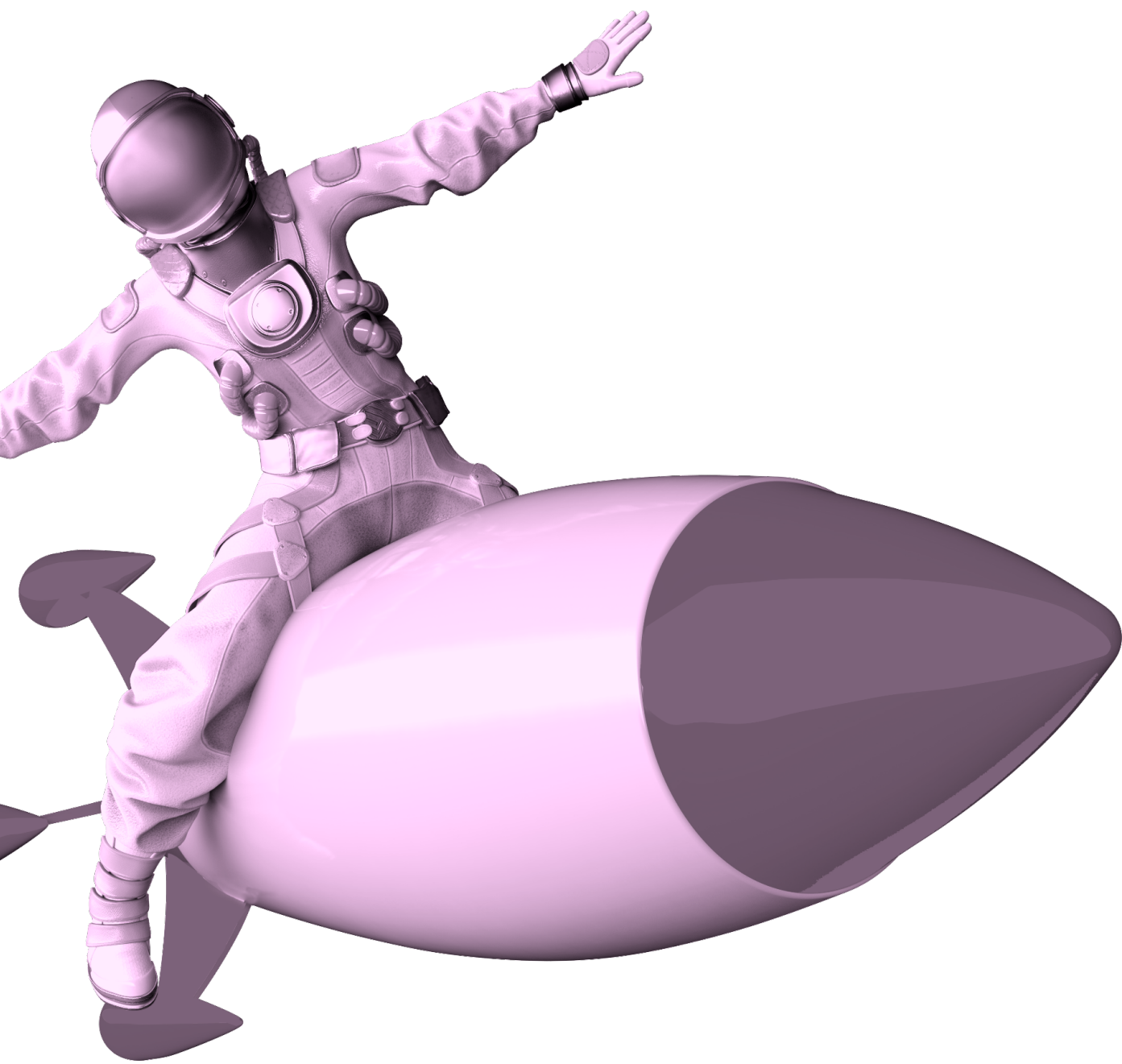Specialized Services amplified

## Agile

Efficiencies created with new supporting roles

Scale to different needs without re-design

Standardized/Efficient

# NOTABLE CHANGES & OPPORTUNTIES

- Promotions

- New Roles/Opens

- Staffing Adjustments

SDA
services delivery alliance

# LEVEL 3
# ORG CHART



Global VP Professional Services

Manager, Service Excellence

Director, Functional Services
NA & APAC

Director, Functional Services
EMEA

Director, Global Technical
Services

Manager, Global Solutions
Architecture

Project Managers

Service Excellence Lead

MGRs

MGRs

MGRs
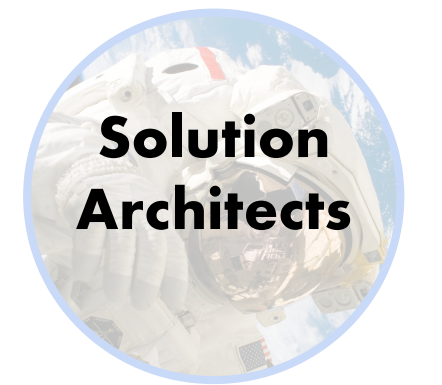
Solution Architects

Functional Consultants

Functional Consultants

Project Managers

Technical Account Managers

Technical Consultants

SDA
services delivery alliance

# LEVEL 3: SERVICE OFFERINGS
## Scalable Structure

### Functional Design Matrix

**65%**
Functional Services

**35%**
Technical Services

**5%**
Service Excellence

**NEW**
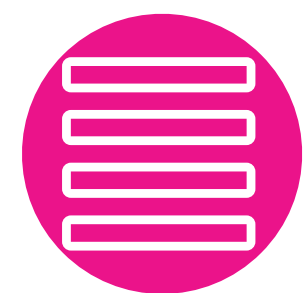Solutions Architects

SDA
services delivery alliance
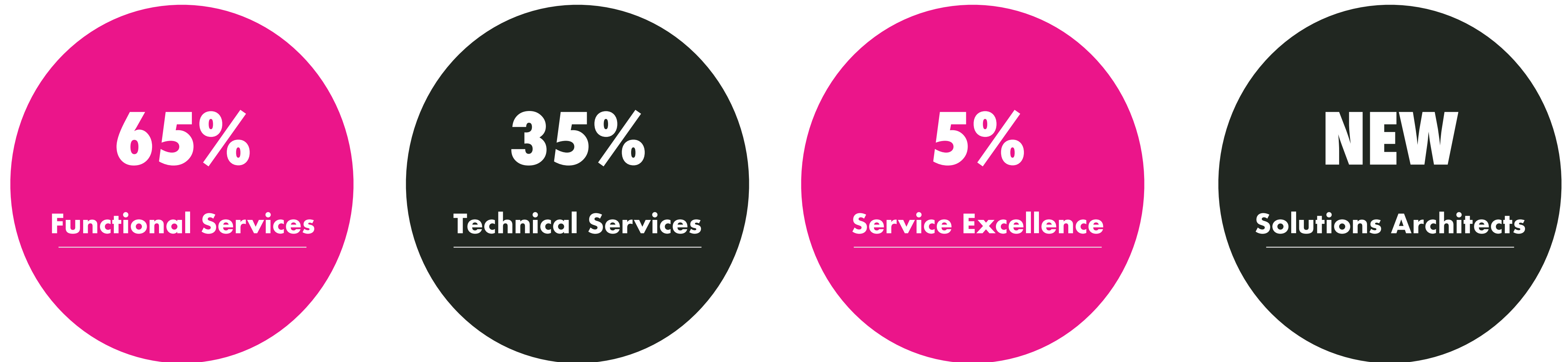
# SERVICES EXCELLENCE
## A new function of PS

**Quality**

Delivery assurance function

**Standardization**

Services design & development

**Utilization**

Ensuring speed of delivery & time to value.

**Innovation**

Evolution of services and new services design. 2023 priority is Enterprise!

SDA
services delivery alliance

# HOW TO JOIN THE CONVERSATION

**Follow the LinkedIn Group**
Search: Services Delivery Alliance

**Join the Slack Channel**
Sign-up: servicesdeliveryalliance.com to receive the link

**Watch for Upcoming Events**
Learn more servicesdeliveryalliance.com

SDA
services delivery alliance

# PRECURSIVE x SDA
# PS MATURITY MODEL.

**Improvised**
## Level 1
Success relies on individual expertise rather than proven methods. The team lacks a clear strategy. Too much time spent firefighting.

The team's processes and tools are ad-hoc and cobbled together.

**Defined**
## Level 2
Early processes are in place for managing resources and projects, and the team has first iteration of services methodology.

This allows the team to begin delivering services in a more consistent and coordinated manner, laying the foundation for future growth and success.

**Repeatable**
## Level 3
Clear processes and structures have been established to facilitate collaboration and coordination with the sales team.

This has been accompanied by a defined vision and strategy for the services offered by the team, as well as the implementation of a PSA solution to provide visibility and control over the team's operations. As a result, the team is now well-equipped to deliver high-quality services to its customers.

**Growth**
## Level 4
The organization has established sustainable operating processes with a strong focus on continuous improvement.

The integration of the PSA solution with the team's CRM and finance systems enables accurate forecasting of revenue based on delivery, providing visibility and control over key metrics to drive growth.

This enables the team to deliver high-quality services in a financially sustainable manner.

**World Class**
## Level 5
Strong, sustainable operating processes in place and a focus on innovation and operational excellence.

The team is seen as a trusted advisor at the highest levels and has world-class resource management and project coordination practices.

The PMO is highly effective, and the team has a highly integrated approach to services execution.

The team has predictable revenue and is able to deliver high-quality services to its customers whilst maintaining strong margins.

| | Improvised (Level 1) | Defined (Level 2) | Repeatable (Level 3) | Growth (Level 4) | World Class (Level 5) |
|---|---|---|---|---|---|
| **Vision** | Reliant on services as crutch to product market fit | Focused on technical implementation | Strategy initiated to identify opportunities across customer lifecycle | Success-led strategy with strong, sustainable operational process | Clear vision combining world class culture, robust operating model that fosters innovation |
| **Commercial** | Siloed sales and services with deals thrown over the wall | Defined handoffs promote partnership | Repeatable sales process, structure and collaboration | Prescriptive methodology accelerates product and PS growth | PS is a trusted advisor by customers and sales anchored around thought leadership |
| **Resource Management** | Jack of all trades approach is ad-hoc & reactive | Foundational processes in place for managing people and projects | Automation promotes proactive approach that helps forecasting | Insight based method with optimized capacity planning | Intelligent resource management function underpinned by analytics |
| **Services Execution** | Startup process with no consistent project delivery process | Initial methodology allows for tracking delivery duration | Repeatable delivery begins to drive faster, consistent delivery | Outcomes based engagements accelerating time-to-value | Innovation is generated across project and consumption based services architecture |
| **Finance & Operations** | Difficult to track performance with ad hoc financial management | Early stage financial improvements and fiscal discipline | More accountability and financial control due to standardization | Accurate forecasting and recognition of revenue and margin | Predictable revenue and high profit margins helps fund future investments |