

2016 EDITION

# TOP 10 PROFESSIONAL SERVICES AUTOMATION SOFTWARE REPORT

Comparison of the Leading Professional Services Automation Software Vendors

# **Overview of PSA Software Solutions**

Professional services automation (PSA) is designed for the lawyer, auditor or consultant in a professional service firm who seeks to better manage projects and resources for clients. This type of solution streamlines business processes to manage documents, record time, bill clients and generate analytic reports to ensure a smooth business for independent contractors. PSA software may also include modules for accounting, client relationship management (CRM), project management and payroll. Similar to an ERP, PSA platforms can act as an umbrella platform to help users throughout all of their operations, increasing efficiency and reducing business risks.

To find the best PSA software and reduce risk of implementation failure, look to solutions that offer seamless module integration with business applications already in place. If you are

planning to consolidate other business platforms and use the modules built into the PSA solution, consider the ease of the migration process from one system to the other. Cloud-based and hybrid platforms will offer added flexibility, while features like billing, reporting and project and resource management improve organization and integration with existing operational processes.

Read on to discover pricing and feature comparisons of the industry's best professional services automation solutions in our Top 10 PSA report.



### **About Business-Software.com**

Business-Software.com is your go-to source for business software reviews, expert advice, in-depth articles and product white papers to meet all of your software needs. We're the most comprehensive online resource for buyers and vendors, catering to more than 300,000 members who trust us to connect them with the right software.

We offer exclusive comparison reports for 80+ business software segments, enabling you to efficiently research and review highly rated software products. Download our free reports to discover top business solutions for Accounting, CRM, ERP, CMS, Manufacturing, HR and more.

# **Top 10 PSA Software Comparison**

**NetSuite** OpenAir PSA

Autotask

FinancialForce PSA

Scoro

**Unanet PSA** 







www.unanet.com

www.netsuite.com

www.autotask.com

www.financialforce.com

www.scoro.com

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**Select Customers** 

BearingPoint, Siemens, Software AG, McAfee, SuccessFactors

**Select Customers** 

Inbay Ltd, Valiant, TCC Technology Solutions, Tech Guru, Datrix



**Select Customers** 

**Key Features** 

Centerstance, Perceptive Software, Esker, Human Concepts, IRM



**Select Customers** 

ClearChannel, Sotheby's International Realty, DPD, DTZ, WSI Digital



**Select Customers** 

**Key Features** 

Adayana Inc, International Center for Research on Women, Digicon Corp

### **Key Features**

















**Key Features** 

































### **Additional Features**

- · Promotes on-time project delivery
- · Automates invoicing
- Automates revenue recognition
- Increases service visibility with improved time and task management
- Equips the service team with mobile access
- Monitor project progress in real time
- · Monitor budgets in detail
- · Forecasting functionality
- · Streamline resource requests and bookings
- · Skills tracking and searching
- Advanced expense approvals and workflows

# **Additional Features**

- · Integrates through open API with tools such as LogMeIn, IBM and BackupAgent
- 24/5 support and 24/7 emergency support via telephone and email, with in-person training available
- · Internal help database with webinars, training videos and community forum
- · Set up and manage contracts
- Performance dashboards
- · Mobile client management
- CRM and opportunity management
- · QuickBooks integration

### **Additional Features**

- · Sales collaboration with opportunity visibility
- · Notifies users when an opportunity is near the closing stage
- Service handoff
- Complete visibility of the complete project lifecyle, from opportunity stages through project completion and billing
- Track all resources. including internal, external, billable, non-billable, sales and support resources
- Social project management
- Bi-directional integration





**Additional Features** 

overview of each client

and project, including

time spent and billed,

meetings, invoices and

expenses, comments

· Manage deals, quotes,

billing and expenses

· Share and access files

real-time sales margin

· Advanced reporting

functionality with

estimation, filters,

groups and trends

· Integrates with iCal,

Calendar, Dropbox,

MailChimp and more

· Use the full-featured

integrations

API to build custom

Outlook, Google

planned tasks and

and files

· Get a complete







### **Additional Features**

- Teamwork collaboration · Real-time performance
- management · Integration manager to ensure automated data
- · Single sign-on for one entry of username and password

exchange

- · Powerful selection criteria for business reports on critical services
- · Government contract solutions and government contract reporting
- · Extensive audit trails for auditors
- Manage all aspects of project-based business operations



# **Top 10 PSA Software Comparison**

Infor SunSystems PSA



www.connectwise.com

ConnectWise

Changepoint PSA



www.changepoint.com

**Projector PSA** 



www.projectorpsa.com

Intacct



www.intacct.com

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www.infor.com

### **Select Customers**

Astra Zeneca, Raymond James, The London **Business School** 



### **Select Customers**

**Key Features** 

Ciracom, ITConnexx, MyIT, Integrity, INTRUST **GROUP** 



### **Select Customers**

Experian, Sage, Open Systems Technology, Stena, Orange



### **Select Customers**

BuzzBee, Electronic Ink, iCrossing, Optaros, Tribal DDB, CustomWare



### **Select Customers**

Mozilla, Guidewire, Great Books Foundation, Consulting Radiologists

### **Key Features**























**Key Features** 







### **Key Features**









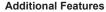












- · Improve cash flow through faster and more accurate billing
- · Reduce revenue leakage through time and expense input routines
- · Assign jobs in line with availability, skills and employee preferences
- · Provide full visibility and control of projects by project managers
- · Intra-company charging provides recognition of internal people costs
- · Microsoft project interface helps users manage projects more easily and reduce training costs

### **Additional Features**

- · Features a complete CRM to manage client pipeline
- · Smart contract management
- · Flexible billing options
- · Integrates with powerful accounting tools, including QuickBooks, Microsoft Dynamics GP, Sage and Xero
- · Offers backup and security integrations
- · Offers the ability to track
- · Support management with ticketing system that monitors SLA performance
- Features dashboards and reports with built-in explanations

### **Additional Features**

- · Establish budgets and assign resources
- · Revenue recognition
- · Manage and collaborate with clients and attain feedback
- Track issues
- Forecast resource demand
- Supports entire customer lifecycle
- Share knowledge across teams
- Provides organizations with a standardized process for analyzing, tracking and forecasting opportunities
- Supports multiple languages, currencies and taxation

### **Additional Features**

- · Multi-currency reporting
- · Collaborate with project managers
- · Dashboards and macrolevel tools provide answers about supply and demand
- · Match projects with qualified people
- · Day-to-day schedule organization
- · Model, design, assign and display projects
- · Track project performance
- · Customize dashboards
- · Collaborate with clients
- · Email alerts when close to going over budget
- Access data at all times from multiple systems

# **Key Features**









## **Additional Features**

- · Designed for QuickBooks graduates who seek a more robust solution
- Purchasing
- · Cash management
- · Order management
- Revenue recognition Fund accounting
- Multi-entity management
- Multi-currency management
- Global consolidations
- Salesforce.com integration
- · Segregation of duties
- · Customizable workflows and transactions
- Automatic backups
- Disaster recovery
- Automatic upgrades