

Best Practices for PSA Self-Implementation

A Guide for Professional Services Organizations

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Executive Summary

Successfully implementing Certinia's Professional Services Automation (PSA) software requires more than just technical deployment. This guide outlines critical success factors and common pitfalls to help professional services organizations evaluate their readiness and plan for successful PSA adoption.

Whether you're considering Icon1 Live or another implementation methodology, understanding these best practices will help ensure your implementation delivers the business value you expect.

The Implementation Reality Check

Most PSA implementations fail not because of technology limitations, but due to organizational readiness gaps. Before beginning any PSA project, honestly assess these critical factors:

Team Capacity & Availability

The Challenge: PSA implementation requires significant time commitment from your best people - the same experts who are typically billable to clients and critical to daily operations.

Best Practice: Plan for 10-20 hours per week from key team members during implementation phases. Also plan for one or more of these same team members to attend Certinia PSA training to accelerate understanding of the solution. If your team can't commit this time, consider additional implementation support to maintain project momentum.

Technical Expertise Requirements

The Challenge: PSA platforms like Certinia are enterprise-grade systems with complex data models and configuration options.

Key Skills Needed:

- **Salesforce Administration:** Understanding of page layouts, permissions, custom settings, flows, and approval processes for minor changes, maintenance, and support
- **PSA Domain Knowledge:** Experience with your specific end to end professional services operations, project structures, and financial processes
- **Data Management:** Ability to extract, transform, and validate data from legacy systems

Best Practice: If you lack these skills internally, factor in external support to bridge the gaps.

The Critical Success Factors

1. Data Migration is Your Biggest Risk

Why It Matters: Data migration often becomes the critical path that delays go-live. The Certinia PSA data model is complex and not intuitive.

Common Pitfalls:

- Underestimating data quality issues in legacy systems
- Not understanding how project structures need to be rebuilt for PSA requirements
- Attempting migration without understanding PSA financial and operational implications

Best Practice: Start data analysis early. Create proof-of-concept projects in your PSA system to understand how your historical projects need to be structured. Budget adequate time for data validation and testing.

2. Change Management Can't Be an Afterthought

Why It Matters: PSA systems change how your organization operates. Even experienced teams need time to adapt to new workflows and processes.

Best Practice Elements:

- Identify champions for each user persona (Project Managers, Resources, Finance, Leadership)
- Plan for "train-the-trainer" approaches to scale knowledge
- Allow time for scenario testing and process validation before go-live
- Prepare for resistance - PSA changes daily workflows for everyone

3. Business Process Alignment Drives Adoption

The Challenge: Out-of-the-box PSA configurations may not match your current business processes. You need to decide what to change and what to configure.

Best Practice: Document your key business scenarios and test them in the PSA system early. Identify gaps and decide whether to modify processes or configure the system. Minor tweaks are normal but avoid major customizations that might impact upgrade paths and supportability.

Resource Planning by Implementation Approach

DIY Implementation (Customer-Led)

When This Works: You have strong Salesforce admin skills, PSA domain expertise, and dedicated project time.

Typical Resource Needs:

- Project Manager: 15-20 hours/week for 8-12 weeks
- Salesforce / PSA Admin: 10-15 hours/week throughout project
- Business SMEs: 10-15 hours/week for familiarization and testing
- Data Specialist: 80+ hours for migration activities

Guided Implementation (Consultant-Supported)

When This Works: You want to accelerate implementation and have gaps in technical expertise or available time.

Consultant Value-Add:

- Accelerate data migration planning and execution
- Provide best practices for PSA process design
- Supplement technical skills for configuration changes
- Reduce risk through proven implementation methodologies

Key Decision Points

Before beginning PSA implementation, answer these critical questions:

Organizational Readiness

- Can we commit dedicated resources for 2-3 months?
- Do we have strong project management discipline?
- Are we prepared to change business processes where needed?

Technical Readiness

- Do we have Salesforce admin expertise?
- Do we understand our current data well enough to migrate it?
- Can we handle technical troubleshooting during implementation?

Timeline Pressure

- Do we have a hard go-live deadline?
- What happens if we need to extend the timeline?
- How will we balance implementation work with billable client work?

The Icon1 Advantage

Icon1 Live addresses many common PSA implementation challenges by providing:

Rapid Foundation: Production-ready PSA configuration in 2 weeks, not months

Proven Methodology: 14 years of PSA implementation experience built into the foundation

Flexible Support: Choose your level of implementation support based on your team's capacity and expertise

Upgrade-Safe Approach: Maintains Certinia's native functionality for maximum supportability

When Icon1 Makes Sense:

- You want to minimize implementation risk and timeline
- You need production PSA capability quickly
- You prefer proven configurations over custom builds
- You want to focus on adoption rather than configuration

Conclusion

Successful PSA implementation requires honest assessment of your organizational readiness, adequate resource planning, and realistic timeline expectations. Whether you choose a DIY approach or engage an experienced implementation partner like Icon, understanding these best practices will help ensure your PSA investment delivers the business value you expect.

For more information about Icon1 Live and how it can accelerate your PSA implementation, contact Icon Cloud Consulting.