



Break the Silos: Best Practices for Aligning PS/CS/Support Resources and Processes

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Facilitators



Brian Hodges

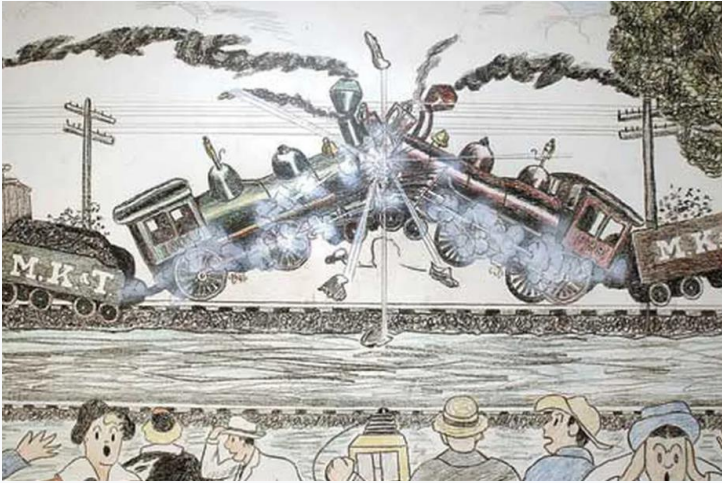
Founder and President
nCloud Integrators



Bo DiMuccio

Distinguished VP, Professional Services
TSIA

What's Gonna Be The Story of Silo-Busting and Organizational Convergence?



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(What can we do to make it more like THIS?)

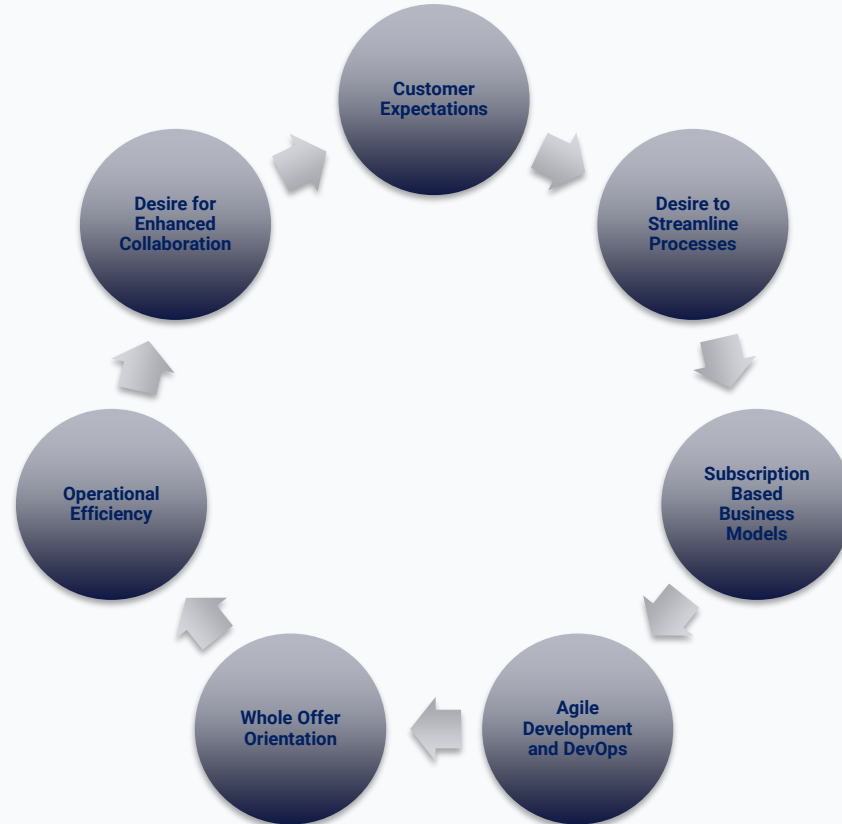
(Especially across PS, CS and Support?)

Agenda

- 1. State of Silo-Busting: The Case of PS**
- 1. PS, CS, Support collaboration Master Class**
- 1. Discussion/Q&A**

State of Silo-Busting: The Case of PS

Silo-Busting Is Not Fake News...



BUT...

It doesn't land evenly

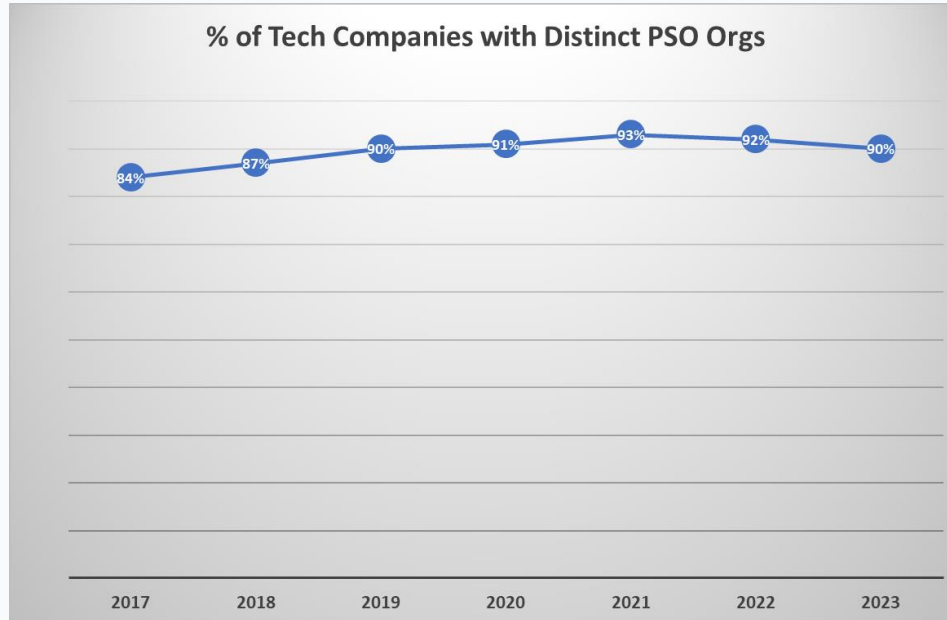
How is silo-busting affecting you?

Things like corporate org design make a big difference. Even product category seems to be a factor. How XaaS-i-fied is your company. That makes a difference too!

Depends on many factors

What's Actually Happening Today?

PS is consistently in the top 2 for frequency of “stand alone” org in place



The PSO isn't going away

Source: TSIA Services Organization Structure Study (annual)

BUT...

“Distinct PSO...”

Doesn't mean it isn't silo-busted to some extent

Silo and busted silos occur in different ways in nature

ALSO depends on many factors

PS Silo-Busting Continuum



PS Fully Siloed

Typical in BU and Geo-centrally organized tech companies

PS is run more or less completely independently

People, process and technology are all unique to or dedicated to PS



PS Partially Siloed

Typical in Services centric and many Success centric tech companies

Some people, process technology unique to PS

Others shared at the level of global services or CX



PS Silos Fully Busted

Possible mainly in a Success centric tech company

All organizational barriers between services are gone

No people, process, financial model or technology unique to PS



Poll Question

Which of these best apply to your situation today?

- a. Fully siloed?
- b. Partially siloed / silo-busted
- c. Silos all busted

You Can Step Back from the Ledge My Friends!!!



But You Need to Take Action



IF YOU'RE
WAITING
FOR A SIGN
THIS IS IT



Polling Question

Which of these is your greatest concern about the silo-busting landscape?

- a. Losing resources to other services functions**
- b. Losing budget**
- c. Losing services delivery opportunities**
- d. Poorly planned delivery consolidation that causes customer problems**
- e. Inability to properly manage PS delivery quality**
- f. I have no concerns whatsoever about the silo-busting landscape**

Quick Poll Result

7. Which of these is your greatest concern about the consolidation landscape?



PS, CS, Support Collaboration Master Class

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Featured



Onboarding and Implementation

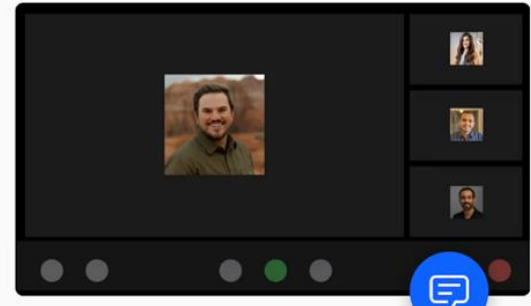
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It's not too late...

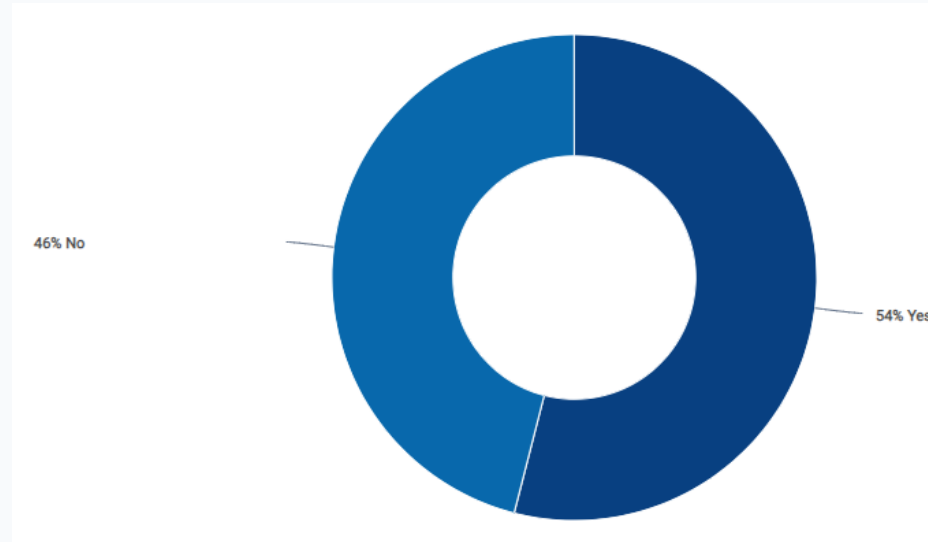


**The time for action is now. It's
never too late to do something.**

Antoine de Saint-Exupéry

Quick Poll Result

1. Is there a Professional Services charter that is understood and accepted at all levels of your organization?



By show of hands, how many in the audience have a service charter for your organization?

Service Charter Considerations

Primary Mission

Financial Model

KPI's

Activities

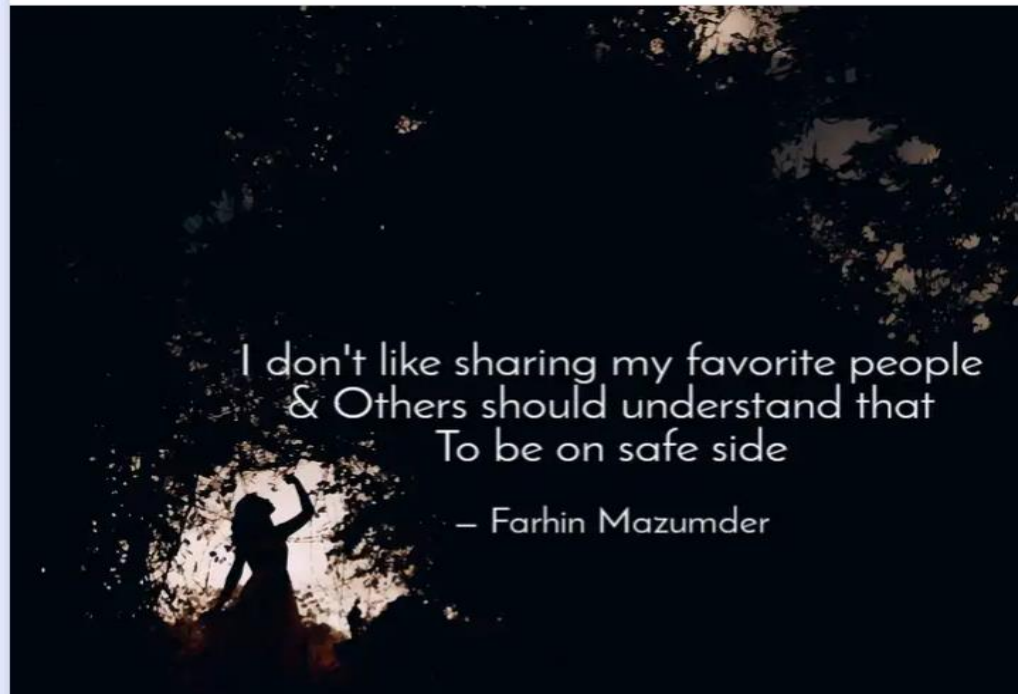
Risks

Dependencies

Suggestions

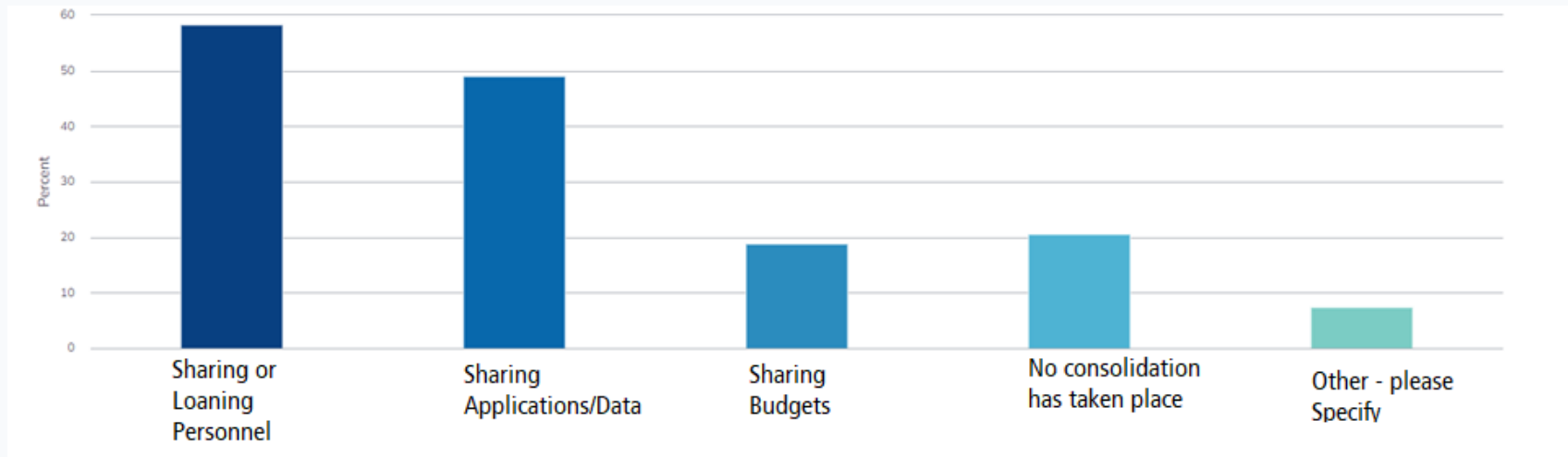
- Start with core role of the organization
- Specify the basic metrics and KPI's
- Provide clarity on areas of overlap – intro/exit activities
- Achieve alignment at all levels
- Create visibility to the enterprise
- Update annually – at a minimum

We love our teams and want to keep them



Quick Poll Result

2. In the past year, which of the following internally focused consolidation of services activities have taken place?



By show of hands, how many in the audience have shared resources this year?

Personnel Sharing Considerations

1: Solution Defined

Customer value,
resource needs and
capabilities, timing

2: Path

Duration, growth
options, expectations,
compensation

Professional
Services

Strategic
Services

Customer
Success

3: Training

Role specific, Soft Skills,
Technical/Solution skills

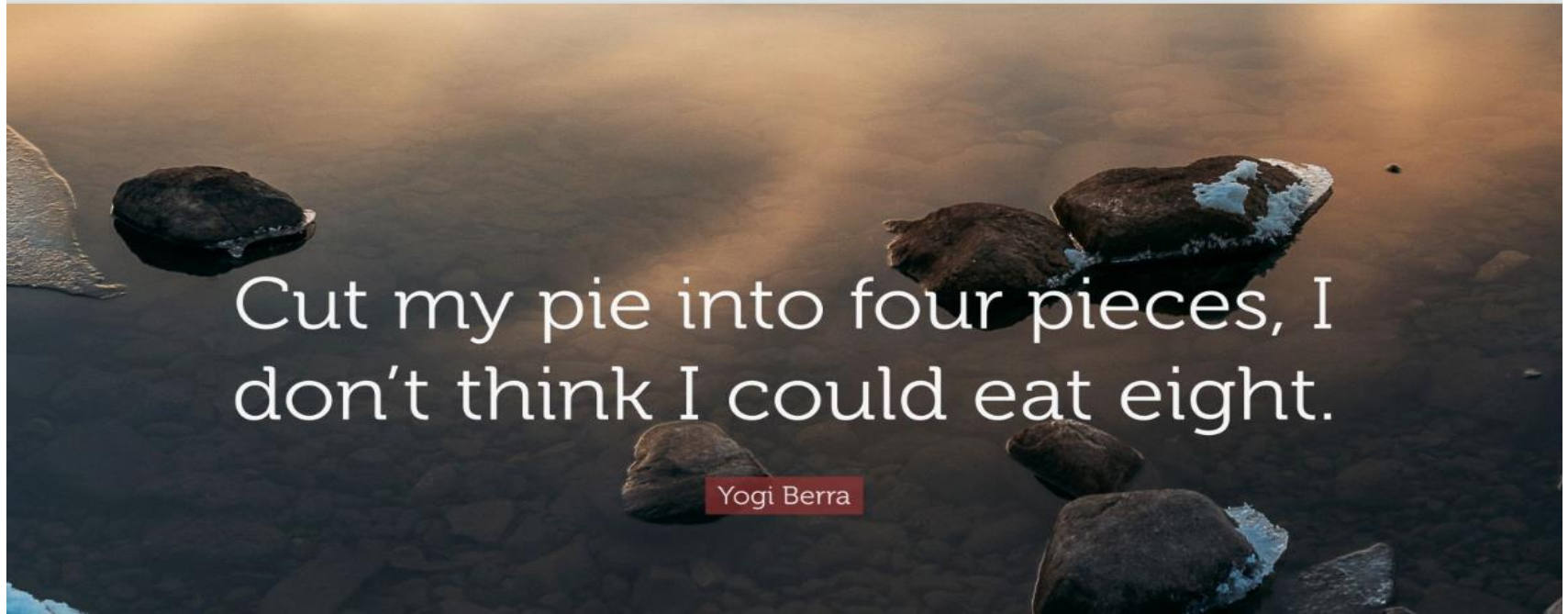
4: Alignment

Financials,
communications,
allocations

Suggestions

- Focus on best outcome for your customers
- Provide clarity on path for resources
- Provide clarity on roles with customer
- Don't assume skills – provide adequate training
- Do the math and get alignment
- Communicate frequently to all stakeholders

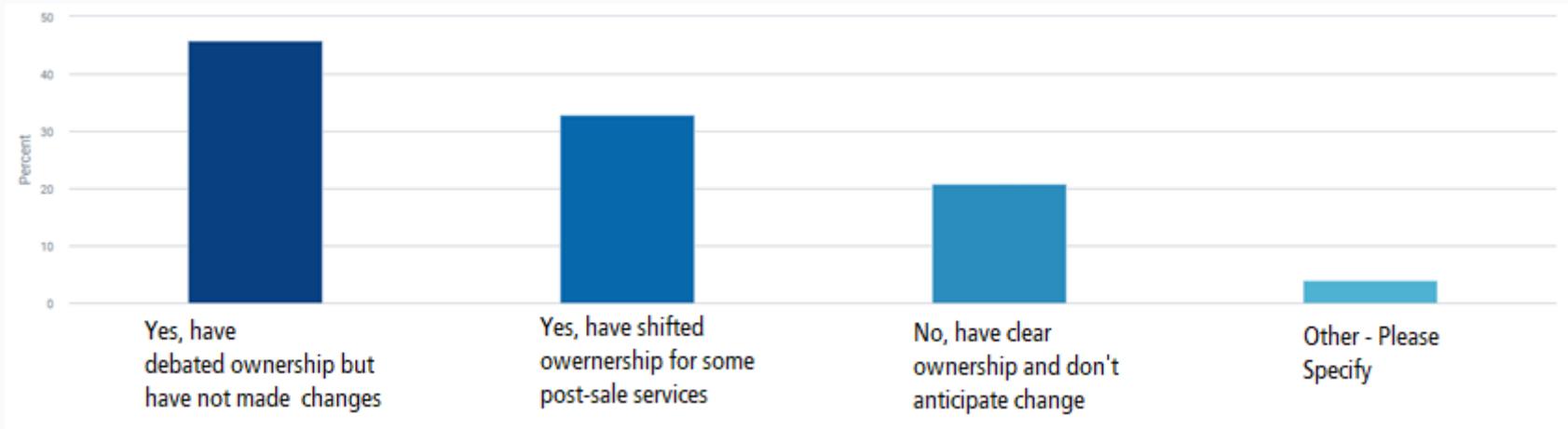
Ownership of the slices of the *Delivery Pie*



Yogi Berra

Quick Poll Result

3. In the past year, has your company debated the ownership and delivery of post-sales services?



By show of hands, how many in the audience have debated delivery ownership?

Delivery Assignment Best Practices



Suggestions

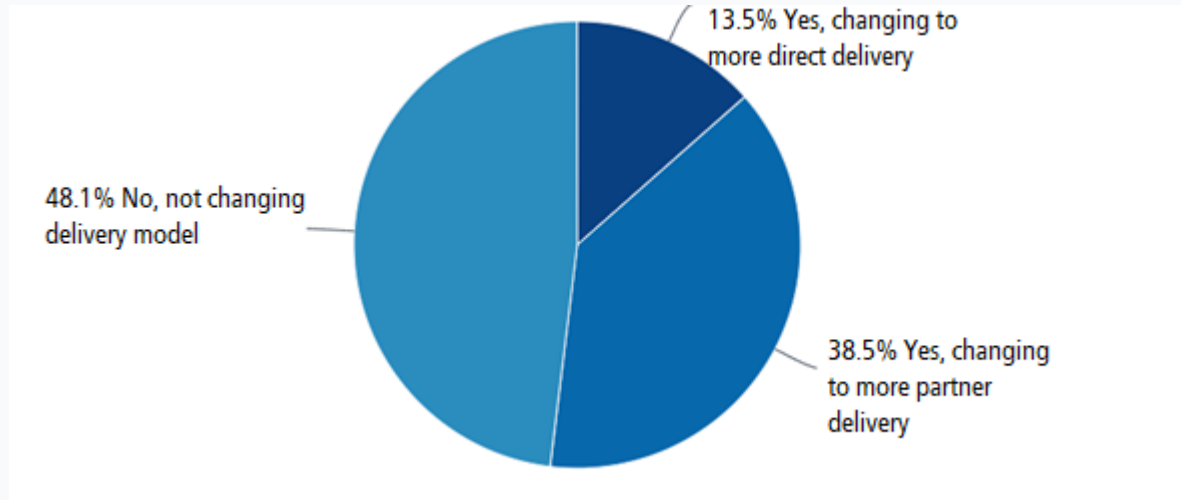
- Start with your customer journey
- Focus on the process first, then the dollars and cents
- Identify overlapping roles with skills across multiple teams
- Determine/document parameters for success
- Update charters with changes in this motion

Partnerships: Impacts and Opportunities

Partnership is not a legal contract between two individuals. It's an emotional alliance between two people who are committed to each others success. - Warren Buffet

Quick Poll Result

4. Is your company considering a significant change in its delivery model, relative to direct vs partner delivery?



By show of hands, how many in the audience are considering a change in partner model...?

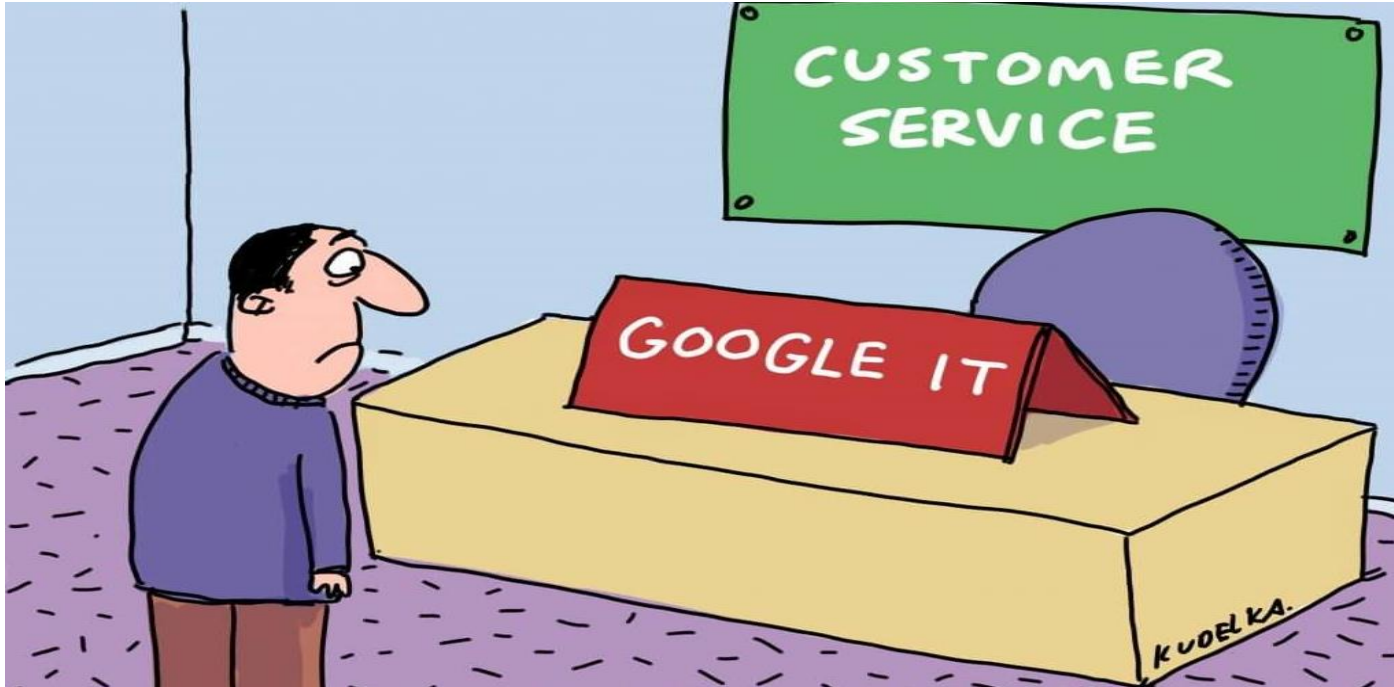
Partner Strategy Best Practices

Design	Acquire	Solution	Enable	Govern
Charter	Resource Profiles	Subcontract Details	Delivery Training	Resource and Financial Metrics
Goals/Objectives	Staffing Models	Joint Solution Delivery	Product Training	Delivery Metrics
Financial Model	Investments	Embedded Services	Methodology Training	Customer Satisfaction
Organizational Structures	Type Selection	Partner Support Solutions	Shadow Programs	Communication Protocols
Practice Integration	Contracts and SLA's	Strategic vs. Tactical	Certifications	Reporting Processes
	Rules of Engagement		Sales Support Model	Escalation Management
			Knowledge Sharing	Risk Mitigation

Suggestions

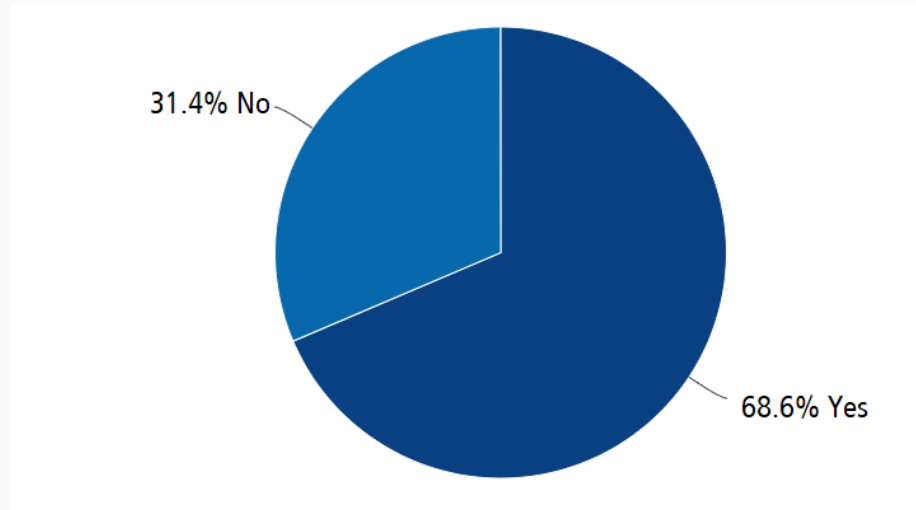
- Define the relationship
- Specify the basic metrics and KPI's
- Provide clarity on areas of overlap
- Create visibility to the enterprise
- Do the math for both parties and get alignment

Digital is the future...BUT



Quick Poll Result

6. Is your organization considering building a Digital Customer Experience (DCX) solution?



By show of hands, how many in the audience are considering a digital Customer Experience solution?

Digital Customer Experience Considerations



Suggestions

- Design with intent
- Teamwork is critical with this motion
- Avoid overcomplicating for internal or external stakeholders
- Start small and build upon successes
- Learn as you go

Summary

1. **State of Silo-Busting: The Case of PS: *Come back of the ledge, but get ready***
1. **PS, CS, Support collaboration Master Class: *PS, CS and Support need tight collaboration to drive company and customer value ... just enough silo but not one iota more***



Questions?



Thank You

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TSIA World

Successfully Navigating the Changing Priorities of Professional Services

A Fresh Look at Services Convergence During Times of Economic Uncertainty

By Bo Di Muccio and Brian Hodges

Introduction

In the fall of 2022 at the TSIA World: Envision conference, TSIA and nCloud Integrators collaborated to conduct a [panel session](#)¹ to explore the topic of professional services (PS) and customer success (CS) charter convergence. Based on attendance to the session alone (there was standing room only!), it was clear that this issue is on the minds of many services leaders. In the three short months since the conference, the business climate has deteriorated substantially. An almost daily barrage of layoff announcements in the tech space is certainly making this an even more critical topic for the start of 2023. As services teams are downsized, there is often a focus on reorganization in an attempt to streamline delivery to help do more with less. Given these uncertain economic times and potential for organizational upheaval, it might be helpful to lean into some of the concepts we explored back in October.

Defining or Refining Service Entity Charters

First, let's start with the focus on clearly defining or refining the charters for the services entities. Between TSIA and nCloud Integrators, we have collectively worked with well over 100 companies, developing or enhancing their customer success or professional services teams (among many other things). The most successful organizations are those with well-defined customer life cycles that are a



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