

# Choosing the Right Professional Services Automation (PSA) Software

## What is a PSA?

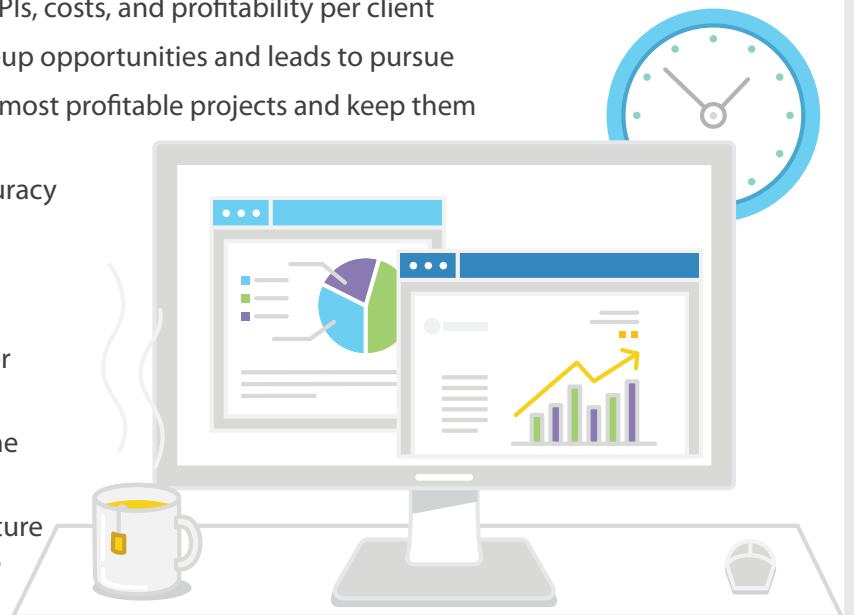
A PSA (professional services automation) tool helps you accurately plan, monitor, and execute on projects. It delivers visibility into your business, and lets you deep dive into the individual moving parts of your projects. With the right PSA solution, your business units and the information they rely on are unified into a single, seamless view.



## Why Do I Need a PSA?

There are a lot of benefits that come with a PSA solution, including:

- Increased productivity** – information is all in one place, so no time is lost to searching
- Improved service** – customers get better service, faster
- Fuller visibility** – quick access to reports, KPIs, costs, and profitability per client
- Win more deals** – set reminders for follow-up opportunities and leads to pursue
- Better project management** – select the most profitable projects and keep them on time
- Faster invoicing** – increase speed and accuracy so that you get paid faster
- Better resource scheduling** – with better visibility, you can better control usage
- Stronger customer relationships** – better service means stickier customers
- Efficient information transfer** – streamline projects from proposal to completion
- Fuller tech utilization** – ensuring you capture all billable time and keep expenses accurate



Looking for a helping hand when it comes to choosing the right PSA solution?  
Find out more at [ConnectWise.com/Manage](https://ConnectWise.com/Manage).

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## How Do I Find the Right PSA?

There are a few key things to consider when it comes to choosing the right PSA.

**Make sure your chosen solution can:**

- Be flexible enough to meet your customers' needs
- Integrate with your current systems and processes
- Be easily mastered by your team and handle everything you'll need
- Provide the level of security your business requires
- Offer superior support with quick issue resolution
- Deliver implementation support for new customers
- Fit into your business budget
- Connect you to a company with industry expertise



## PSA Comparison Checklist

Leverage the checklist below to compare between different PSA solution offerings.

Solution Name	PSA Option A	PSA Option B							
Flexibility?									
Integrations?									
Team Adoption?									
Security?									
Support?									
Implementation Support?									
Price?									
Company Expertise?									