ERP for Professional Services: PSA Modules Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced digital economy, Professional Services Automation (PSA) within Enterprise Resource Planning (ERP) systems has become a strategic driver for efficiency, profitability, and growth. ERP for Professional Services: PSA Modules Training Course empowers professionals to master ERP-based PSA modules that streamline project management, time tracking, resource allocation, billing automation, and performance analytics. Learners gain hands-on experience with real-world tools, integrated workflows, and intelligent dashboards that optimize service delivery and financial control.

By merging cloud ERP solutions, AI-driven analytics, and automation technologies, this training enables participants to unlock the full potential of professional services management. Participants will learn to configure, deploy, and manage ERP PSA modules for enhanced project visibility, improved utilization rates, and smarter decision-making. The course blends theoretical insights with interactive workshops, case studies, and scenario-based simulations for maximum practical impact.

Programme Curriculum

ERP for Professional Services: PSA Modules Training Course

Introduction

In today’s fast-paced digital economy, Professional Services Automation (PSA) within Enterprise Resource Planning (ERP) systems has become a strategic driver for efficiency, profitability, and growth. ERP for Professional Services: PSA Modules Training Course empowers professionals to master ERP-based PSA modules that streamline project management, time tracking, resource allocation, billing automation, and performance analytics. Learners gain hands-on experience with real-world tools, integrated workflows, and intelligent dashboards that optimize service delivery and financial control.

By merging cloud ERP solutions, AI-driven analytics, and automation technologies, this training enables participants to unlock the full potential of professional services management. Participants will learn to configure, deploy, and manage ERP PSA modules for enhanced project visibility, improved utilization rates, and smarter decision-making. The course blends theoretical insights with interactive workshops, case studies, and scenario-based simulations for maximum practical impact.

Course Duration

5 days

Course Objectives

1. Understand ERP for Professional Services Automation (PSA) fundamentals and architecture.
2. Implement end-to-end project lifecycle management within ERP systems.
3. Configure AI-powered resource planning and utilization tools.
4. Optimize time tracking and expense management workflows.
5. Automate billing and invoicing using ERP PSA modules.
6. Analyze real-time financial reporting and analytics dashboards.
7. Apply data-driven project forecasting and profitability analysis.
8. Integrate CRM and ERP systems for unified business intelligence.
9. Ensure compliance, governance, and audit readiness in ERP PSA.
10. Use cloud-based ERP PSA platforms for remote and hybrid teams.
11. Enhance workflow automation through low-code/no-code ERP tools.
12. Develop strategic KPIs and performance metrics for services firms.
13. Manage change and digital transformation initiatives effectively.

Target Audience

1. ERP Consultants and System Integrators
2. Project Managers and Program Directors
3. Financial Controllers and Accountants
4. IT Managers and Solution Architects
5. Business Analysts and Data Analysts
6. Operations and Service Delivery Managers
7. HR and Resource Planning Professionals
8. Management Consultants and Implementation Partners

Course Modules

Module 1: Introduction to ERP for Professional Services

- Overview of ERP and PSA integration
- Key benefits and success metrics
- Core components and architecture
- Role-based dashboards and reporting
- Industry trends in digital transformation
- Case Study: Deloitte’s ERP PSA Implementation for Global Consulting Efficiency

Module 2: Project Management & Lifecycle Automation

- Project setup and milestone tracking
- Automated scheduling and dependencies

- AI-driven project forecasting
- Risk and scope management
- Collaboration tools and document sharing
- Case Study: Capgemini’s PSA Deployment for IT Project Governance

Module 3: Resource Planning & Utilization

- Skills mapping and resource pools
- Smart allocation algorithms
- Utilization and availability metrics
- Forecasting demand and supply
- Integration with HR modules
- Case Study: Accenture’s Resource Optimization through ERP PSA

Module 4: Time, Expense & Billing Automation

- Timesheet automation and compliance
- Expense capture and reimbursement workflows
- Multi-currency billing configuration
- Automated invoicing and approvals
- Real-time financial visibility
- Case Study: PwC’s Automation of Time and Expense with ERP Integration

Module 5: Financials & Revenue Recognition

- Chart of accounts setup for PSA
- Revenue recognition rules
- Project costing and profitability analysis
- Budget vs. actual variance reporting
- KPI dashboards for financial insight
- Case Study: EY’s Revenue Recognition Automation via ERP PSA

Module 6: Analytics & Performance Management

- Business intelligence and data visualization
- Predictive analytics and trend analysis
- KPI-driven performance monitoring
- Custom dashboards and role-based views
- AI and ML insights for decision-making
- Case Study: KPMG’s Analytics Framework for Professional Services ERP

Module 7: Integration & Cloud Deployment

- Cloud ERP architecture overview
- Integration with CRM, HR, and Finance
- Data migration and system configuration
- Security, privacy, and compliance setup
- Continuous improvement and optimization
- Case Study: SAP Cloud ERP PSA Rollout for a Global Law Firm

Module 8: Change Management & User Adoption

- Stakeholder engagement and communication
- Training and competency development
- Change impact assessment
- Post-implementation support strategy
- Continuous learning and optimization
- Case Study: IBM’s ERP PSA Change Management for Consulting Divisions

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com