

THE POWER OF BEING UNDERSTOOD
ASSURANCE | TAX | CONSULTING

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RSM team



certinia

Certinia PS Cloud

What is Certinia Professional Services (PS) Cloud?

Professional Services Cloud is used by services organizations to manage their projects, people, and processes.

- Resource & Utilization Management
- Skills & Certifications Management
- Services Revenue Forecasting
- Project & Program Management
- Project Tasks & Milestones
- Time and Expense
- Project Profitability
- Community & Portal Access for Customers and/or Partners

Problems to Solve

- 
- Reliance on spreadsheets

- 
- Not built for services


- 
- Siloed teams

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- Fragile integrations

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- Stale information

- 
- Manual / rigid processes

Metrics to Improve



- Estimate accuracy




- Resource utilization



- Delivery quality



- Revenue capture



- Forecast Accuracy



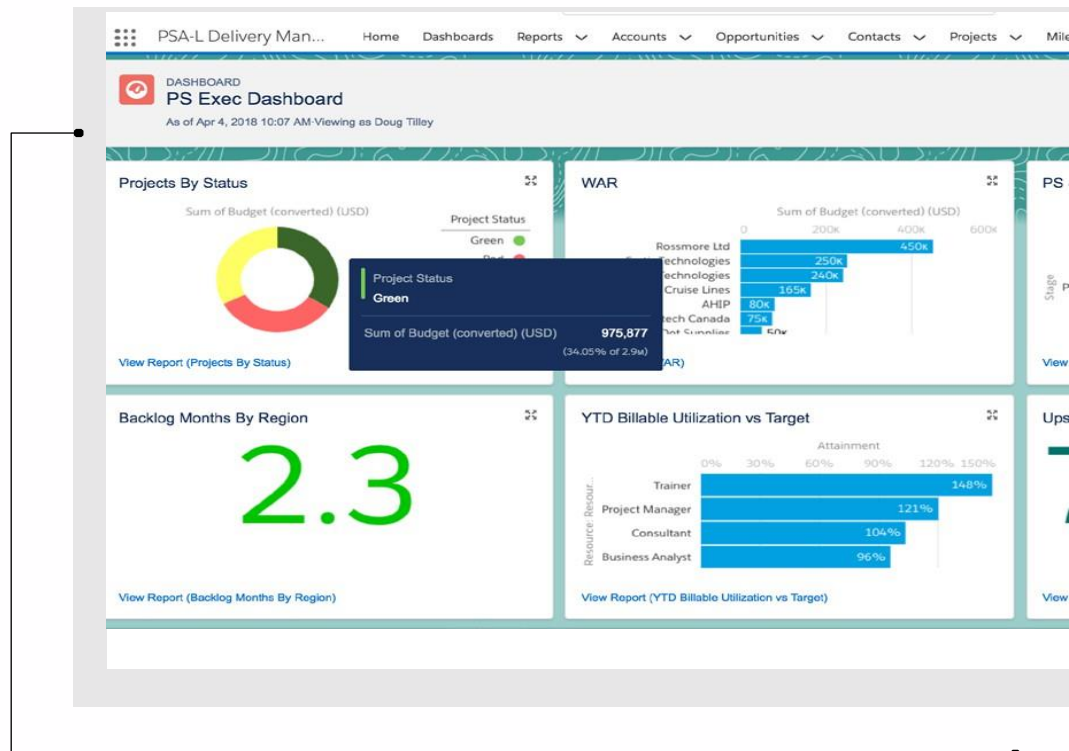
- Customer retention

Certinia Professional Services Suite



Certinia Professional Services (PS) Cloud

Keep projects on time and profitable, customers happy, and reports up to date with the Professional Services Cloud solution on the Salesforce platform.



Connecting your services business at every stage

Certinia's Professional Services (PS) Cloud, consistently ranked the industry's top choice, gives business leaders and teams unprecedented visibility into sales, delivery, and finance.

With everything on Salesforce, you get the insights you need to manage projects and resources while tapping into powerful business forecasting. Empower your teams, improve customer satisfaction, and grow profits with Certinia PS Cloud.

Certinia Professional Services (PS) Cloud

Perfect sales-delivery handoff

- With Salesforce CRM and Certinia PS Cloud on the same platform, opportunities instantly translate into service engagements. Empower sales teams with real-time insights about project statuses, resource availability, and more. Connect sales and delivery, and everybody wins.

Right resource, right time

- Give resource managers the visibility they need by identifying the resource demand during the sale. Easily schedule the right people onto the right projects at the right time and resolve staffing conflicts before they become problems.

One team, one tool

- Companies with greater project visibility achieve higher win rates, utilization, and margins. With sales, delivery, and finance teams all using the same tool, you'll get better visibility into pipeline, resource demand, and other critical project data.

Billing & revenue recognition

- Extensible and configurable, our app manages multiple revenue streams so you can add new lines of business, move into new markets, and expand overseas while staying in complete control.

Decisions made with certainty

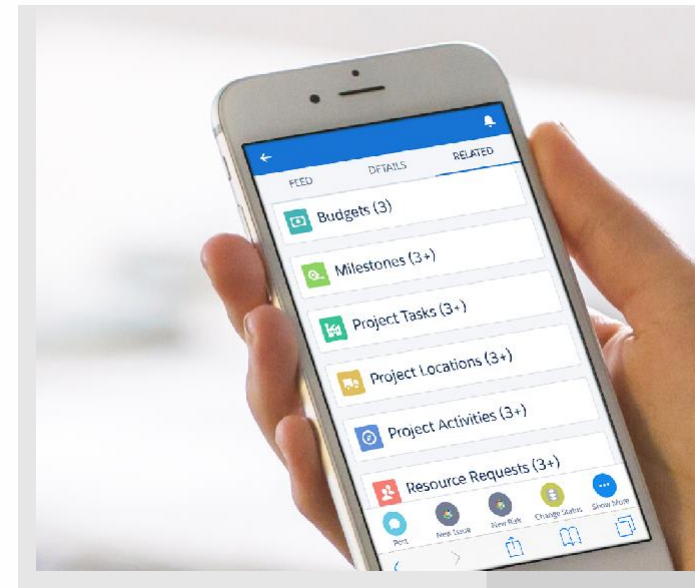
- Automate and streamline processes across every aspect of your business from sales and delivery to billing and revenue management. Track everything, including billing and expenses in multiple currencies, and automate compliance with new revenue recognition rules.

Powerful forecasting

- Optimize resource planning and project profitability with hyper-accurate forecasting and insight capabilities built-in. Get unmatched visibility into every dollar recognized and planned. Build staffing models geared to drive higher margins, quicker delivery, and better customer satisfaction.

Reporting & analytics

- Real-time dashboards and reports give you all the data you need, including actuals, expenses, assignments, milestones, resource requests, backlog, and more. Get complete visibility into the information you need to efficiently deliver on projects and accurately forecast future business.



Certinia Professional Services (PS) Cloud

Increased utilization

- Using Certinia PS Cloud with Salesforce helps delivery teams streamline processes across the board. Third-party analyst firms, including Services Performance Insight (SPI), have found that organizations with integrated PSA and CRM systems see boosted metrics, including:
 - Increase in year-over-year revenue growth
 - Reduced sales cycle (qualified lead to contract signing)
 - Increased pipeline and revenue per project

Analytics & predictability

- Certinia Services Analytics provide deep visibility and insights into billings, backlog, capacity and utilization. Combining these analytics with the broadest set of delivery data available in the market gives your business a clear view into future growth.
 - Get a deeper understanding of overall business health
 - Increase predictability with clearer views into forecast, backlog, and utilization
 - Surface and manage KPIs to fuel business growth

Services community

- Optimize your customer and partner interactions with Certinia Services Community. As your project management hub, Services Community lets you share project-related information and status updates, get time and expenses entered straight into the system, and keep track of critical financial data.
 - Connect to Salesforce Chatter for real-time updates
 - Collaborate from any device on shared documents
 - Customize for a completely branded experience

Social Collaboration

- Native to the Salesforce platform, Certinia PS Cloud includes support for Chatter collaboration tools right out of the box, allowing delivery teams to share insights, attach documents, or note anything related to a project.
 - Bring Facebook-like collaboration functionality to project delivery
 - Create project groups and discussion
 - Empower teams to use mobile devices

Time & expenses

- Highly configurable and easy to use, Certinia PS Cloud makes it easy for teams to complete administrative tasks and submit time and expenses.
 - Time entry available via Salesforce1 app
 - Get mobile time and expense entry for iPhone/Android
 - Set up flexible approvals and routing

Resource Management

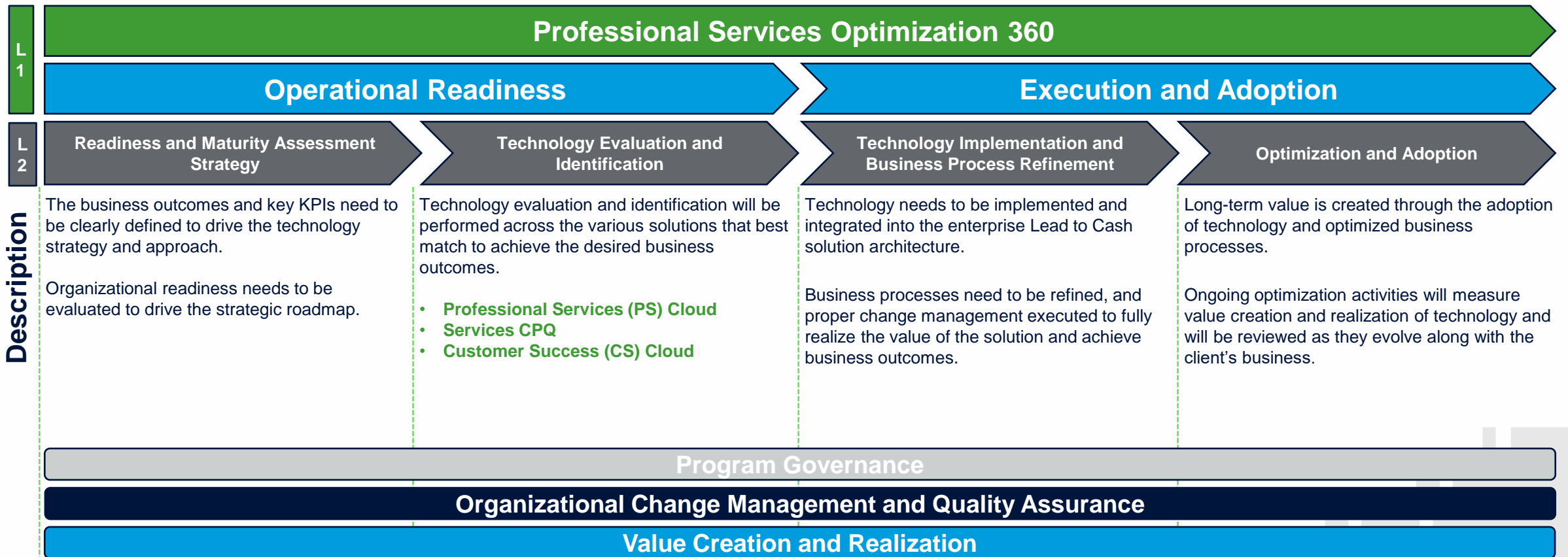
- Bring people and project data together with Certinia and your HCM system so you can manage all your worker data in one place.
 - Increase margins and revenue through a unified view of your people, skills, and projects
 - Update calendars and timecards automatically
 - Bridge the payroll register to your general ledger

Salesforce platform

- Natively built on the Salesforce platform, Certinia PS Cloud gives you the scalability and flexibility of the world's #1 cloud platform. So instead of maintaining your IT stack, you can focus on serving customers and growing the business.
 - Enjoy a sleek, easy-to-use, and secure user experience
 - Tap into AppExchange, the world's leading business app marketplace
 - Leverage the future of reporting and analytics

Why RSM?

RSM provides services organizations an end to end, holistic solution to drive positive business outcomes and realize their full potential using technology.





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