certinia

Services Estimator

The financial governance layer of the intelligent services operation engine

Estimation is not the end of the sales process.
It is the first act of profitable delivery.

Every deal that closes without financial governance is margin already lost

The gap between a signed contract and a staffed project is where margin dies. Not in delivery. Not in billing. At the point of sale—when scope is set on instinct, resources are promised without capacity insight, and financial commitments are handed to delivery on a spreadsheet or a call.

This is the **project handoff gap** — the point where deal data is lost or distorted between sales and services. It drives the **manual tax** on delivery teams— rebuilding scope, re-staffing resources, and fixing errors before the first billable hour. And it compounds with every deal.

Estimation is no longer just quoting. It's the **first line of margin defense**—where costs, billings, margins, and risks must be modeled with certainty, not approximated in spreadsheets.

Firms that don't govern margin at the point of sale pay an invisible tax on every deal. Without automated financial governance, margin erosion stays hidden until it hits the P&L—when it's already too late.

From quoting tool to financial governance engine

Certinia is the industry's leading Professional Services Automation system, unifying sales, delivery, finance, and customer success on a single record powered by a comprehensive AI engine that acts with certainty across the entire services journey.

The Certinia Services Estimator is the financial governance layer of that engine — built natively on Salesforce, transforming estimation from an administrative quoting function into the first act of profitable delivery. Every deal connects to an executable project plan on a single, unified record.

The Services Estimator is built on **deterministic scaffolding**: hardened financial logic that standardizes complex configurations through **guided scoping**, surfaces margin risk at the point of sale, and ensures every estimate is both competitive and profitable — regardless of the estimator's experience level. Rules-bound where your P&L depends on it. Generative where your team benefits from it.

Unlike bolted–on CPQ tools…

Legacy CPQ tools are built for product sales, not services delivery. The quote closes, and delivery starts from scratch — re-entering scope, rebuilding resource plans, reconciling financials. There is no native connection to project execution or financial governance. The handoff gap they create is the dead zone made permanent.

Services Estimator closes the dead zone.

Because the Services Estimator, PS Cloud, and Salesforce CRM share a single, unified record, an approved estimate automatically becomes an executable resource plan and service delivery project — turning the sales document into a delivery blueprint in minutes, not days. Zero manual transfer. Zero Context Gap.

Governed at the point of sale. Profitable before it closes.

Every estimate built in the Services Estimator is built on hardened financial logic — modeling costs, billings, margins, expenses, risks, and contingencies with 100% auditability. Deterministic logic governs margins before the deal closes, so margin protection is upstream, not a postmortem.

Guided scoping

Guided Scoping applies business rules and historical patterns to automatically generate accurate estimates based on customer requirements — regardless of the estimator's experience level. Quoting is standardized. senior project managers stop being pulled into every deal just to validate scope.

Proactive margin modeling

Risk, contingency, and margin vulnerability surface at the point of sale — before the deal closes — using hardened financial logic, not probabilistic guessing. Hardened approval workflows ensure no deal closes below target margin without explicit governance sign-off.

As sold vs. as delivered analytics

Closed-loop accountability closes the feedback loop between estimation and execution. By comparing estimated performance against actual delivery data, organizations continuously refine pricing models, eliminate recurring margin errors, and hold both sales and delivery accountable — so the same mistake never happens twice.

Industry benchmarks from best-in-class implementations

84%
Projected reduction in scoping steps (Salesforce)

80–90%
Faster quote and renewal cycles

5–7%
Average improvement in project margins

The deal closes. Delivery starts. No dead zone.

The Services Estimator doesn't hand off to delivery. It becomes delivery. The moment an estimate is approved, it automatically converts into an executable resource plan and services delivery project within PS Cloud — with zero manual data transfer. The sales promise is executable on day one.

Resource contouring intelligence

Week-based resource demand profiles — roles, skills, hours, timeline — are built directly on the sales opportunity, giving delivery teams an early, accurate capacity forecast before the deal closes. The resource adequacy crisis caused by deals closing without delivery visibility is eliminated before it starts.

Delivery automation

Approved estimates automatically generate executable resource plans and services delivery projects within PS Cloud. First resource briefed in minutes, not days — so your delivery team can focus immediately on the judgment work that drives client outcomes.

Native architecture — No integration to break

Because the Services Estimator is built natively on Salesforce alongside PS Cloud, there is no integration to maintain, no data to reconcile between systems, and no maintenance spiral consuming the innovation budget. The sales promise and the delivery plan live on the same record from the first bid to the final invoice.

Eliminating the manual tax

The manual transfer of scope, resources, and financials from sales to delivery is where the manual tax is most expensive — not just in time, but in errors, delays, and margin leakage that compounds across every deal. Delivery Automation eliminates it entirely.

Built for every leader who owns the margin.

CFO / Finance Leader	PSO / Services Leader	COO / Operations Leader
The Challenge	The Challenge	The Challenge
Margin erosion is invisible until it hits the P&L. Estimates are built on gut instinct and spreadsheets, leaving financial governance to chance — and margin erosion accumulates silently across every deal.	Every deal that closes kicks off a frantic, manual scramble to rebuild what sales already scoped. High-value delivery experts become data janitors — re-entering scope, re-staffing resources, and firefighting handoff errors before the first billable hour is logged.	The firm is running sales on one system, quoting on another, and delivering on a third — with manual syncing stitching them together. Every integration is a liability. Scale is impossible without adding headcount to manage the administrative plumbing.

CFO / Finance Leader	PSO / Services Leader	COO / Operations Leader
How Services Estimator Solves It	**How Services Estimator Solves It**	**How Services Estimator Solves It**
Deterministic Financial Governance: hardened approval workflows, rules-bound margin modeling, and as sold vs. as delivered analytics ensure every deal is profitable before it closes — and every variance is explainable after it delivers.	Zero-Distance Delivery: Guided scoping standardizes estimation so delivery gets an executable project plan the moment the deal closes. Resource contouring means the right people are identified before the ink dries — not after the kickoff call.	Single System of Action: the Services Estimator connects Salesforce CRM, estimation, resourcing, and PS Cloud delivery on a single, unified record — no integrations to break, no data to reconcile, no dead zone between sales and services.
The Outcome	**The Outcome**	**The Outcome**
Move from hoping deals are profitable to knowing they are — before they close.	*Stop rebuilding what sales already sold. Start delivering the moment the deal closes.*	*Replace the patchwork of disconnected systems with a single record from first bid to final invoice.*

PROOF

Hard ROI. Real customers.

These are verified outcomes from organizations that have replaced spreadsheet-based quoting and disconnected CPQ tools with the Services Estimator as the financial governance entry point of the Intelligent services operation engine.

Salesforce	84% projected reduction in scoping steps. 72% reduction in mouse clicks for deal bookings. Project creation up 100% and management speed improved 10× — powered by guided scoping and delivery automation.
Hyland	1% revenue forecast variance maintained across global services operations using PS Cloud and Services Estimator together — deterministic logic governing the world's largest professional services operation.
Five9	Automated all business processes from lead generation to billing across 17 countries on a single, unified Certinia record — eliminating costly human errors and achieving cost-effective global scale.
BeyondTrust	20% increase in resource utilization globally. 5% reduction in project management overhead and 40 hours per week returned to project managers through delivery automation.

Architecture is the advantage.

The Services Estimator is not a standalone quoting tool. It is the financial governance entry point of the intelligent services operations engine — the only estimation solution that is natively unified with CRM, resource management, and project delivery on a single record.

Native architecture — No context gap

Built natively on Salesforce alongside PS Cloud and Salesforce CRM, the Services Estimator operates on the same record as your customer data, resource capacity, and project delivery — with no syncing, no middleware, and no integration to break. Off-platform CPQ tools create the project handoff gap. Native architecture eliminates it.

Deterministic scaffolding — No guessing at your P&L

Every financial output is governed with rules-bound logic, not generated by probabilistic AI. 100% auditable. Hardened approval workflows, multi-currency support, and rules-bound margin modeling ensure every deal is profitable before it closes — and every variance is explainable after it delivers.

Professional services institutional memory

The Services Estimator is not built on generic AI. Its guided scoping is grounded in professional services institutional memory — a closed-loop system built on services-specific ontology and deterministic scaffolding that generic AI tools simply cannot replicate. Your institutional data remains within your governed environment.

Ready to govern margins at the point of sale?

See Services Estimator in action at **here**