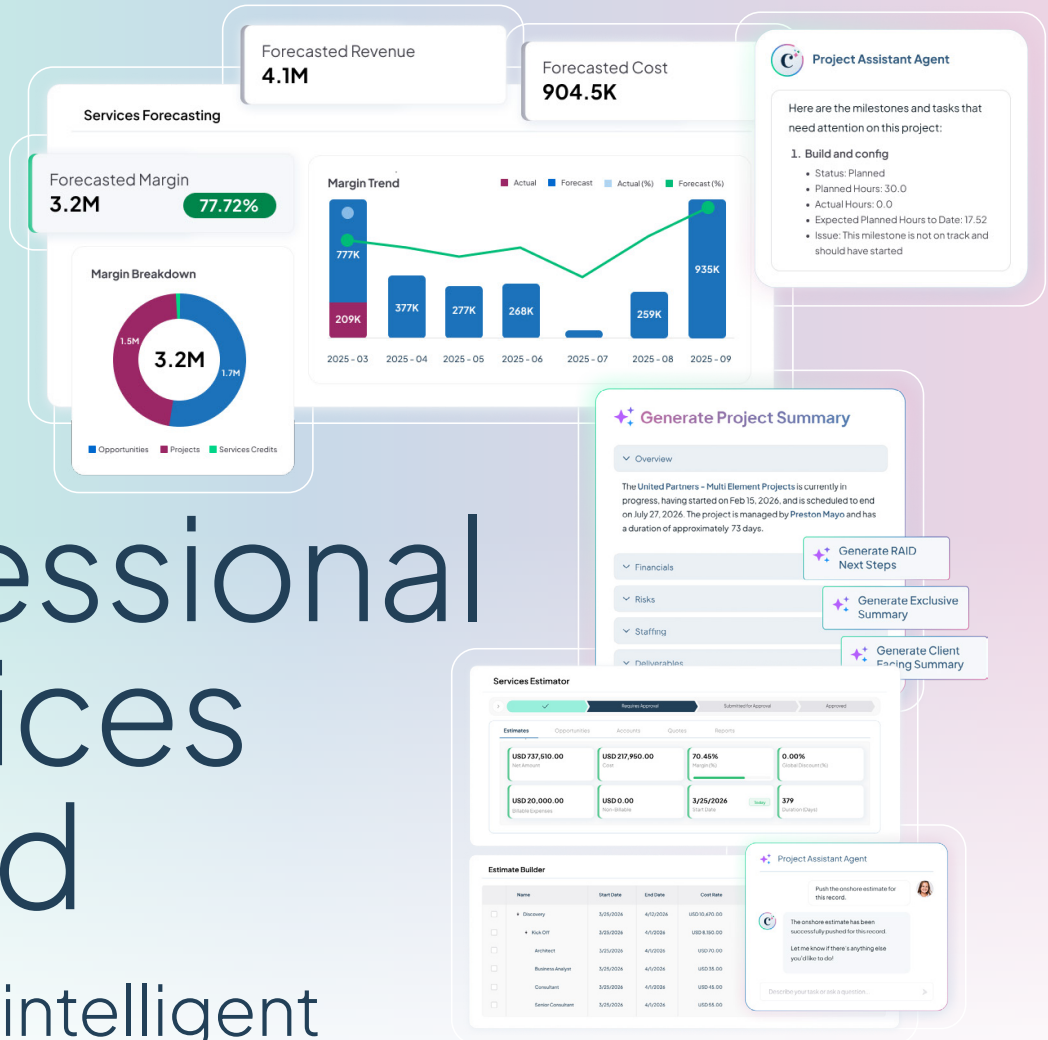


certinia

Professional Services Cloud

Certinia's intelligent services operations engine

Your services business runs on projects. Projects run on decisions. Decisions run on data. The question is whether your data — and the AI built on top of it — is working for you or against you.



THE CHALLENGE

The manual tax is eating your margins

Professional services firms today face a structural problem: the more they grow, the more of that growth gets consumed by the cost of managing it. Project Managers spend 20+ hours a month as **data janitors** — manually updating RAID logs, composing status emails, reconciling timecards, and tracking down resource availability. Finance leaders work from forecasts that are probabilistic at best and wrong at worst. CIOs maintain a **Franken-stack** of disconnected tools that require constant reconciliation and leave AI blind to the operational context it needs to act.

This is the **manual tax**: the friction cost of running a services business on systems that were never designed to work together. It doesn't show up as a line item. It shows up as margin erosion, missed forecasts, delayed project starts, and high-value talent doing low-value work.

The services industry is past “AI curiosity.” Leaders are moving toward production-grade AI with hard ROI — solutions that demonstrably impact the bottom line. The firms that get there first will create a structural competitive advantage. The firms that don't will pay the manual tax indefinitely.

THE SOLUTION

One system. Certain intelligence. Zero context gap.

Certinia is the industry's leading Professional Services Automation (PSA) 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.

At the core of that engine is Veda, Certinia's AI engine for services operations, combining specialist agents and intelligent actions grounded in decades of institutional memory to shift services organizations from reactive workflows to autonomous operations.

Because Veda lives natively inside the same record that runs your revenue recognition, resource scheduling, and project delivery, it doesn't just advise — it acts.

Most AI gives you a scribe.

A scribe summarizes. It reads your project record and writes a nice update. It can tell you what happened. It cannot change what happens next.

Veda is an operator.

Because PS Cloud owns the project record, Veda can execute — updating RAID logs, reallocating resources, generating success plans, calculating margins. It automates the intelligence work so your people can focus on the judgment work that drives client value.

Close the dead zone between sales and services

The gap between a signed contract and a staffed, running project is where margin dies and client confidence erodes. In most organizations, this “dead zone” is a manual handoff — a flurry of emails, spreadsheets, and re-entered data that delays the moment of first value delivery.

PS Cloud eliminates it. With Salesforce CRM and Certinia on the same platform, opportunities instantly become service engagements. Veda can generate a complete Success Plan the moment a deal closes — analyzing opportunity and account data to create contacts, actions, risks, and expansion potential automatically. What once took a CSM hours takes seconds.

Intelligent sales–delivery handoff

Sales teams see real-time project status and resource availability. Delivery teams see the sales promises and customer context. There’s no re-entry, no lost context, no delayed start.

Right resource, right time

Identify resource demand during the sale — not after. Schedule the right skills onto the right projects with full availability visibility and resolve conflicts before they delay delivery.

Services forecasting with margin visibility

Spring 2026 introduces a transformational upgrade: full **revenue, cost, and margin** visibility in a single forecast view. Project managers see their project forecast in context, from within the project page. Service leaders see the picture across region, practice, and group — with history tracking on every adjustment and conversation.

The velocity imperative

AI is shrinking the time between initial quote and first revenue. PS Cloud gives you the architecture to compete — not just by moving faster, but by moving with certainty.

+39%

Average win ratio

-23%

Average discount
on contracts

+143%

Average YoY
PS revenue

DELIVER WITH CONFIDENCE

Veda handles the intelligence work. Your team handles the judgment work.

Delivery is where the manual tax hits hardest. Project managers managing a dozen or more concurrent projects cannot read every record, update every log, and compose every client email manually — not if they're also supposed to be solving real problems for clients. Veda's **specialist agents** and intelligent actions are purpose-built for exactly this: automating the intelligence work so your people can elevate judgment.

Stay ahead of every project

Project Summary delivers an instant digest of every key project dimension — financials, risks, staffing, schedule, and deliverables — in seconds. **Project Tasks Summary** reads the entire WBS and surfaces what's completed, overdue, blocked, and needs attention, with recommended next actions. **Executive Summary** generates a concise internal narrative for stakeholders, configurable to your organization's specific needs.

Never let a risk become a crisis

RAID Next Steps uses Veda to extract the top Risks, Issues, Actions, Assumptions, Decisions, and Dependencies from the project RAID log in seconds — with direct links and the ability to create new items without leaving the view. The **Project Assistant Agent** monitors milestones, tasks, and timecards, flagging overdue items, scheduling mismatches, and missing entries before they become problems.

Keep clients informed without the administrative load

Client Facing Summary drafts a proactive client update email grounded in real project data — highlighting key risks and the actions taken to address them, while automatically filtering out internal-only data like project margin. What took an hour per project now takes seconds across a full portfolio.

Staff every project with the right people

Resource Summary gives Resource Managers a one-click AI profile of a resource's experience, secondary skills, and clients served — so staffing decisions are faster and better informed. The **Reallocation Agent** handles one of the most time-consuming RM tasks: when a resource needs to be replaced on work in flight, it identifies all affected assignments, executes best-match searches, and proposes a reallocation plan in minutes.

“ We couldn't live without Certinia PS Cloud.
It's ingrained in what we do.

Mark Conklin, Senior Director of Operations, Salesforce

The only AI the CFO can trust to run the P&L

In finance, “close enough” is a strategic liability. Probabilistic AI that guesses at your financial outputs — margins, RevRec, billing, utilization — doesn’t just produce wrong numbers. It produces a **trust deficit** that makes every decision downstream less reliable. Leaders stop trusting the system. They build shadow spreadsheets. The manual tax compounds.

PS Cloud governs your financials with **deterministic logic** — the same rigorous, rules-bound math that runs your actual revenue recognition and billing. Financial outputs are 100% auditable, not probabilistic. Every margin calculation, every RevRec entry, every forecast adjustment is governed, not guessed.

Billing & revenue recognition

Extensible, configurable billing manages multiple revenue streams — milestone-based, time and materials, subscription, and usage — across currencies and geographies, with automated compliance for revenue recognition rules.

Services forecasting

Spring 2026 closes the margin visibility gap: the existing model surfaced revenue but not cost. The new services forecasting architecture delivers revenue, cost, and margin in one place, with resource-level cost detail, embedded analytics, and forecasts embedded directly in project and RPG record pages.

Analytics & predictability

Over a dozen real-time analytics dashboards and three machine learning solutions give you complete visibility into billings, backlog, capacity, and utilization. Deterministic scaffolding ensures every output is auditable. Salesforce runs its global services business on PS Cloud with a 1% forecast variance managing 20 million billable hours.

Resource management

A unified view of people, skills, and projects — integrated with ADP or your existing HR system — keeps calendars and timecards current automatically and bridges the payroll register to the general ledger. Higher utilization, lower cost-per-project, better margins.

WHO IT'S FOR

Built for every leader in your services business

CFO / Finance Leader	PS / Delivery Leader	CIO / IT Leader
The Challenge	The Challenge	The Challenge
Probabilistic forecasts and manual RevRec reconciliation erode margins and make cash flow unpredictable.	High-value experts spend 20+ hours a month as data janitors on status updates, RAID logs, and client emails.	A Franken-stack of disconnected tools creates a context gap that prevents AI from being effective and drains the innovation budget.
How PS Cloud + Veda Solves It	How PS Cloud + Veda Solves It	How PS Cloud + Veda Solves It
Deterministic logic governs every financial output — margins, RevRec, billing — with 100% auditability. No guessing at your P&L.	Veda Specialist Agents automate the intelligence work — project summaries, RAID extraction, resource reallocation, client communications — so your team focuses on the judgment work that drives client value.	Native architecture built inside Certinia on Salesforce — no syncing, no integration risk, no data leaving your governed environment. Zero Context Gap.
The Outcome	The Outcome	The Outcome
<i>Move from historical accounting to strategic financial Intelligence.</i>	<i>Stop managing spreadsheets. Start orchestrating outcomes.</i>	<i>Escape the maintenance spiral with the only architecture where AI has zero context gap.</i>

PROOF

Hard ROI. Real Customers.

These aren't estimated benefits or analyst projections. They are verified outcomes from organizations running their services business on Certinia PS Cloud.

Salesforce	1% forecast variance managing 20 million billable hours globally — powered by deterministic logic, not probabilistic guessing.
Hyland	695% ROI and \$4.1M in total benefits by eliminating the manual tax and unifying operations on a single record.
Five9	\$2.5M in incremental annual revenue by shrinking the dead zone between sales and services delivery.
BeyondTrust	20% higher global utilization and a 10% increase in project margins through centralized resource orchestration.

Architecture is the advantage

Every major software vendor now claims AI. The question is not whether a solution has AI. It is whether that AI has the architecture to be trusted with your operations.

Native architecture — No context gap

Veda lives natively inside Certinia on Salesforce — full context from first bid to final invoice, no syncing required. Off-platform AI solutions can never close this gap because they sit outside the system. Your data never leaves your governed environment.

Deterministic logic — Why it can be trusted

Financial outputs are governed with rules-bound logic, not generated by probabilistic guessing. 100% auditable. Every margin calculation and RevRec entry follows the strict services math of your business — the only AI architecture a CFO can rely on.

For a full account of how Veda's architecture works — including its dual AI reasoning model, deterministic scaffolding, and the distinction between scribe AI and operator AI — see the Veda Solution Brief.

Ready to stop paying the manual tax?

See PS Cloud and Veda in action at [certinia.com](https://www.certinia.com)