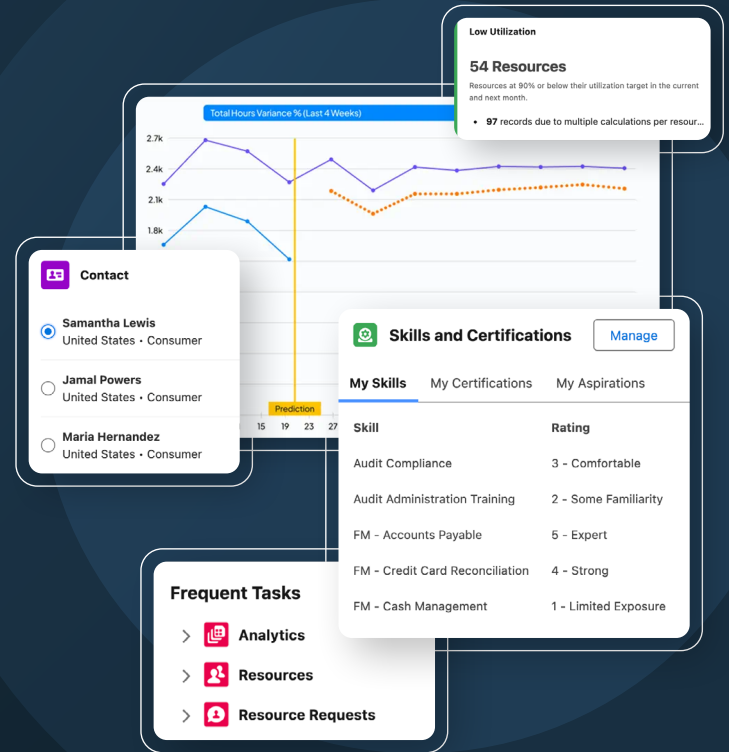


certinia

Professional Services Cloud

Keep projects on time and profitable, customers happy, and reports up to date with the AI-powered professional services cloud solution on the Salesforce Platform.



Connecting your services business at every stage

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

Natively built on the Salesforce Platform, you gain the unified data fabric and insights needed to manage projects and hybrid resources while tapping into powerful, AI-driven business forecasting.



The richness and transparency of data that Certinia PS Cloud provides is critical for our ability to scale our growing global workforce.

Ryan Brown, Senior Director of Operations, Global Professional Services at Splunk

splunk>

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 AI-assisted delivery, and everybody wins.

Right resource, right time

Give resource managers the visibility they need by identifying the resource demand during the sale. The Staffing Agent instantly schedules the right people onto the right projects at the right time, resolving 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, including outcome-based models, so you can add new lines of business, move into new markets, and expand overseas while staying in complete control.

Streamlined, automated processes

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

AI-driven decisions

Make your business more predictable and teams more productive with Certinia's Predictive, Generative, and Agentic AI. This orchestration engine helps PSOs unlock the trillion-dollar opportunity. Get the unmatched visibility and insight you need to optimize planning and 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 AI-forecast future business.

Customers using Certinia solutions have experienced numbers like:*

>90%

less revenue leakage

>99%

data accuracy
month-over-month

85%

utilization

* As reported by Certinia customers Thales and Ladd Partners

Staffing agent (Agentic AI)*

Don't let staffing issues derail your projects. This agent automates resource allocation, freeing managers from manual work. Find the right person for the job in minutes, keeping projects on schedule and managers focused on high-impact tasks.

- Find a replacement for an absent team member in minutes, not hours.
- Quickly adjust to last-minute project changes without the administrative headache.
- Scale your team and business without increasing the administrative burden of resource management.

Increased utilization

Using Certinia PS Cloud with Salesforce helps delivery teams streamline processes across the board. Third-party analyst firms, including Service Performance Insight, 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

[Talk to our PS Cloud experts](#)

Project summaries (GenAI)*

Stop digging through long reports. Transform complex data into a valuable overview of deliverables, staffing, and financials. Get a clear, simple picture of project health in seconds.

- Identify risks and get suggested remedies for staffing gaps before they become bigger problems.
- Instantly assess a resource's suitability for a role and get remedies for any resource issues.

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 Salesforce 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 ADP (or your existing HR 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

*Available via Certinia's Early Adopter Program.

Certinia empowers the world's best technology and services organizations to deliver customer value with certainty. Our solutions, built on the Salesforce platform, connect all aspects of technology and services businesses. By orchestrating your people and projects around a central account record, Certinia ensures confident decision-making and intelligent delivery across the customer journey. For more information, visit www.Certinia.com.

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