

certinia

Customer Success Cloud

Turn customer value into retention and growth by running your business with full context on one system of record.

The collage features several key dashboard elements:

- Task List:** A list of tasks with progress bars and status indicators. The first task, 'Initial Customer Communication', is 100% completed. Other tasks like 'Monitor user engagement and telemetry...' are in Draft status.
- Summary Metrics Table:**

Metric	Weighting	Value	Score
Days From Invoice to Payment	7.00%	421	85
Months Remaining on Contract (without a new deal agreed)	5.00%	115	60
Revenue Retention Rate (from previous contract)	7.00%	639	75
Escalated Cases	5.00%	16	80
Open Cases	5.00%	27	89
Total Support Cases (this year)	5.00%	42	82
Generating... Contract	5.00%	25	100
	5.00%	77	60
- Create Playbook:** A section for creating and managing playbooks, showing templates like 'C-Level Change (Digital)', 'Adoption Review', 'Acquired New Product', 'Delayed Upgrade', and 'Adopting Customer'.
- Success Tracker:** A table tracking various success metrics:

Name	Progress	Status
ACHE Success Plan	100%	Draft
Increase Adoption	100%	Draft
Training Engagement	25%	In-Progress
Send email containing...	0%	Planned
Provide link to staffed	0%	Planned
Schedule 1-on-1 call	0%	Planned
- Completed Steps:** A list of actions completed as part of a process, such as 'Case Summary generated', 'Account Summary generated', and 'Customer Communication generated'.
- CS Activities:** A section for customer service activities, including notes on customer impressions and AI-generated summaries.
- Playbook Tasks:** A detailed view of a specific task, including start/end dates and time, and a note about a training request.
- Health Score by Account:** A horizontal bar chart showing health scores for various accounts:

Account	Health Score
Slingsby Communi...	72
Allied Technologies	72
Double Eagle Solutions	72
KPI Telecom	78
ABC Corporation	79
United Partners	81
Northern Pocket Elec...	83
Prestige Worldwide	89

DELIVER VALUE WITH CERTAINTY

Connect your data, your teams, and your revenue.

Achieving a complete, coordinated picture of the entire customer lifecycle has long been an elusive goal for CS leaders. Their teams are held accountable for NRR but are often structurally locked out of the revenue process, forced to defend renewals from a context vacuum.

As the only CS platform built natively on Salesforce, Certinia eliminates functional silos to give teams the authority and security required to drive growth. By unifying context and intelligence within the Salesforce Trust Domain, Veda provides the essential orchestration layer to operationalize success and prove measurable ROI.

Orchestrate the full customer journey

Unify every touchpoint into a single view, from opportunity to renewal, to build a complete picture of every customer. By eliminating the “context gap,” Veda provides the orchestration layer that turns this holistic customer data into the proactive signals and actions required to deliver measurable outcomes.

Align GTM teams & processes

CS Cloud breaks down the functional silos that slow down your go-to-market teams. By unifying key functions like Sales, Services, and Success on Salesforce, collaboration across teams becomes easy. Our specialist AI agents and your team leverage shared context to automate handoffs, trigger cross-functional playbooks, and ensure every resource is focused on NRR.

Turn customer insights into proactive action

Transition from firefighters to value architects. By transforming disconnected data into real-time intelligence, Veda proactively flags at-risk accounts and identifies expansion signals before revenue begins to leak. This allows your team to move beyond reactive motions and focus their authority on the high-value interactions that deliver outcomes.

Operationalize best practices

By standardizing best practices based on unique customer journeys, CS Cloud gives you and your teams a simple, repeatable, predictable approach to optimizing customer success. Integrated AI coaching provides in-the-moment guidance and prescriptive next steps to ensure your team follows the most effective path to value.



Every customer success solution has a connector to Salesforce, but Certinia’s Customer Success Cloud is the only one natively built on Salesforce.

Jim Roth, President, Customer Success at Salesforce

Scale without the cost

By using intelligent orchestration to handle everything from value tracking to renewal workflows, your organization can scale its success motions without a linear increase in headcount. This allows your team to manage more accounts with higher precision, ensuring growth remains profitable.

CS agent in action*

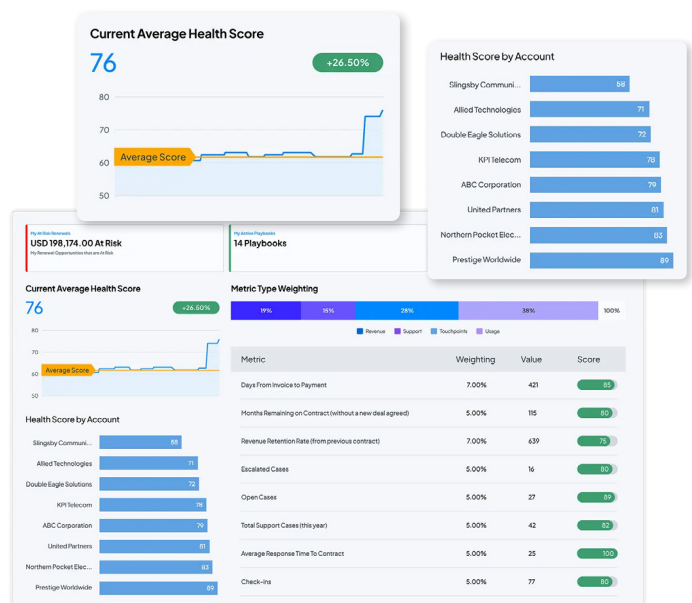
The Customer Success Agent handles routine work for you. Get complete account summaries so your CSMs can quickly get up to speed on an account. Then it proactively recommends next steps, builds playbooks, and completes tasks automatically, eliminating admin work and ensuring you take the right action at the right time.

Accelerate time-to-value with Generative AI

Turn sales insights into success plans in seconds to speed customer time-to-value. Quickly define clear objectives, milestones, and paths to success from day one so CS teams can deliver impact faster. Track progress toward value in real-time to clearly prove ROI and stay aligned with your customer.

Avoid “heroic acts of account management”

In conjunction with Certinia’s other solutions — Professional Services Cloud and Financial Management Cloud — CS Cloud can manage your entire customer lifecycle. By identifying customer risks early, it fosters the kind of quick stakeholder response that avoids the need for “heroic acts of account management,” and brings your Customer Success teams onto your customer platform of record--Salesforce.



*Available via Certinia’s Early Adopter Program.

Ready to turn customer value into retention and growth?

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

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. Founded in 2009 and headquartered in Austin, Texas, Certinia is backed by Haveli Investments, General Atlantic, and Salesforce Ventures.

For more information, visit www.Certinia.com.

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