9 reasons services delivery works better on the Salesforce Platform

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The professional services industry continues to grow and grow.

But growth for every professional services organization is not guaranteed.

Are delivery and sales working together to build the right deals?

In order to tap into the opportunities on the market, services leaders must evaluate their systems and processes to ensure that they're functioning as drivers and not roadblocks.

Can you plan for future staffing needs? Do you have the visibility you need to keep projects on track? In this eBook, we'll explore these issues and share **the top nine reasons why services delivery works better on the Salesforce Platform.**

1

Bridge the sales and services delivery divide

In order to deliver successful, profitable projects, your services delivery team needs to be actively engaged in scoping, planning, and pricing deals. But too often services delivery is not involved in either the sales process or collaborating with the sales team on deals. When this happens, it typically results in project staffing problems, consultant shuffling, or the wrong skills being brought to a job.

When your sales team works with the services delivery team on a single platform, they can operate in unison and focus on selling the right deals at the right prices. The benefits are twofold: First, the services delivery team can assign the right project resources, with the right skills and availability, to successfully deliver customer expectations against the agreed project plan. In turn, successful projects result in happy, referenceable customers, helping sales teams win more business down the line.

2

Improve forecasting and plan more effectively

A single platform for both sales and services delivery means that your forecasting and capacity planning can instantly pull data from both ongoing projects and deals in the sales pipeline. With this demand-side view, your organization can confidently plan revenue and staffing requirements for the long term, something rarely achievable when sales data lives in one silo and project data lives in another. This means that the issues of over or undercapacity can be effectively avoided, optimizing utilization rates while reducing the risk of burnout.

3

Keep partners and customers in the loop

Customers and partners prefer working with services companies that can best collaborate, share, and communicate during delivery, adopting a 'one team' engagement model. To this end, the Salesforce Platform allows you to create customer and partner communities, online sites that securely provide relevant project information in real time. These de facto project management hubs allow your team to share, store, and manage all your project-related files in a central place, and start conversations via Salesforce Chatter.

The use of communities will not only improve communications about project status, but will also reduce billing disputes. Equipped with all the visibility and information you need to create customer invoices and track vendor and subcontractor payments, communities allow you to reduce costs and keep margins on track.

4

Configure the system to your organization's processes and requirements

No two professional services organizations run completely alike, so your teams shouldn't be forced to work within a rigid system. The Salesforce Platform is inherently flexible, which makes it easy to implement and automate the processes and requirements unique to your business.

By applying your delivery processes and tracking your most important metrics across both sales and services delivery, you can improve consistency, engage the right resources, and boost customer satisfaction. Additionally, the Salesforce Platform allows you to personalize systems to drive usability, encourage adoption, and maximize the value of automation through configurable forms, custom objects, 'clicks, not code' workflows, and more.

5

Build your delivery strategy on facts, not guesswork

Running a services business is hard. Running a services business without meaningful data is even harder. Bringing all of your customer, operational and financial data together in one place provides a 360 view of the whole business which is hugely impactful.

The Salesforce Platform offers powerful, flexible reporting tools to help get you the visibility and the information you need to make smarter, game-changing decisions to improve margins, utilization, and other KPIs. These built-in, fully customizable reports and dashboards allow you to drill down into analytics in a myriad of ways. For services delivery teams, this speed of information allows for quick course corrections and creates confidence to plan for the future.

6

Sell, resource, deliver, and bill from anytime, anywhere

Whether you run a team of road warriors or deliver projects remotely, your services delivery team members must be able to work from their smartphones and/or tablets. With your organization running on the Salesforce Platform, your team can access data, reports, and documents on a mobile device as easily as they can from a laptop or desktop machine. That means everyone gets complete visibility into sales activities, project delivery, and billing from a single mobile app, streamlining approvals and collaboration between team members, partners, and clients.

7

Protect your data with enterprise-grade security

Salesforce provides a world-class data infrastructure, protecting the business-critical data of many of the world's largest organizations. By running your business on the Salesforce Platform, you provide the same level of protection to your projects and data, including security best practices, user single sign-on, physical data center security controls, threat protection processes, and data privacy certifications. Get visibility into system availability and performance at trust.salesforce.com.

8

Centralize approvals, compliance, and policy management

Consistent, demonstrable adherence to both your own company policies as well as client policies is essential to controlling costs and minimizing billing disputes. The Salesforce Platform provides a sophisticated enterprise approvals engine that allows you to define and monitor approval processes across your entire organization. It provides one place to define your organizational hierarchy, manage point-and-click multi-level approval rules definitions, and automate non-erasable approval history audit trails.

Approval rights can also be extended to customers and partners via the communities mentioned earlier. Additionally, having this common engine for approvals means your teams have only one tool to learn, your managers can manage approvals from a single list, and your auditors have one place to review policy documentation and to test compliance.

9

Build accountability into every action

When it's time for an audit, having your transactions, supporting documents, audit trails, approvals, and conversations in one place will shrink audit times, reduce costs, and minimize the effort required from you to support the audit process. With all your opportunities, quotes, projects, timecards, expense reports, and billing activity available in one database, your auditors can perform their step-by-step transaction walk-throughs by simply clicking from record to record. They can also view the entire project lifecycle from end to end, including all attached documentation and discussions between your team, partners, and customers.

Experience Certinia

Certinia elevates business growth through a complete Services-as-a-Business solution spanning services delivery, finance, and customer success. Native to the leading cloud platform, Salesforce, Certinia enables organizations to run a connected business, deliver with intelligence, and achieve scalable agility.

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