



# G2 Professional Services Automation Enterprise Report

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Winter 2024



certinia

# Who is G2?



G2 is the world's largest tech marketplace where businesses can discover, review, and manage the technology they need to reach their potential.

The Winter 2024 G2 Grid® Report for **Professional Services Automation** scores products and vendors in this space based on reviews gathered from the user community, as well as data aggregated from online sources and social networks. G2 applies a unique algorithm to this data to calculate the customer Satisfaction and Market Presence scores in real time.

# What is professional services automation?

Professional services automation (PSA) describes the software for managing and automating the business processes surrounding service delivery. The goal is simple: Optimize these processes holistically to improve delivery execution and overall profitability. By managing resources, projects, time and expenses, budgets, financials, billing, and customer interactions from a single dataset, a PSA solution gives you a complete view of delivery, leading to more insights and improved business agility.

This type of software can be used by all departments of a professional services company, from sales and marketing to accounting, as well as project managers. Additionally, any organization with professional services teams, including companies in health and life sciences, media and communications, and software and high-tech, can also benefit from PSA software.

PSA systems can be integrated with accounting software, CRM software, and payroll software to make a more end-to-end solution. PSA software also has similarities to ERP systems.

**To qualify for inclusion in the PSA category on G2, a product must:**

- Manage customer profiles, sales opportunities, and communications
- Include features for contract management and service level agreements (SLA)
- Provide project and portfolio management for professional services
- Deliver accounting functionality or integrate with accounting software
- Track project and portfolio costs such as time and expenses
- Record and allocate resources based on necessity and availability
- Recognize revenue by project, portfolio, or business unit
- Monitor project and portfolio performance, risk, and profitability

# Professional Services Automation Grid



## Contenders

Contender products have relatively low customer Satisfaction scores and high Market Presence compared to the rest of the category.



## Market Leaders

Products in the Leader quadrant are rated highly by G2 users and have substantial Market Presence scores.



## Niche

Niche products have relatively low Satisfaction scores and low Market Presence compared to the rest of the category.



## High Performers

High Performing products have high customer Satisfaction scores and low Market Presence compared to the rest of the category.

Certinia PS Cloud  
has been named the  
leader by G2  
based on receiving  
a high customer  
Satisfaction score  
and having a large  
Market Presence.

Certinia is an essential part of our platform... our end-users do not know where Certinia ends and Salesforce begins. 99

**Lori Steele**  
EVP, Salesforce

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# Certinia

Certinia PS Cloud has been named a Leader by G2 based on receiving the highest customer Satisfaction (97%) and having a large Market Presence. 93% of users rated it 4 or 5 stars, 87% of users believe it is headed in the right direction, and users said they would be likely to recommend Certinia at a rate of 86%. Certinia is also in the ERP Systems category.

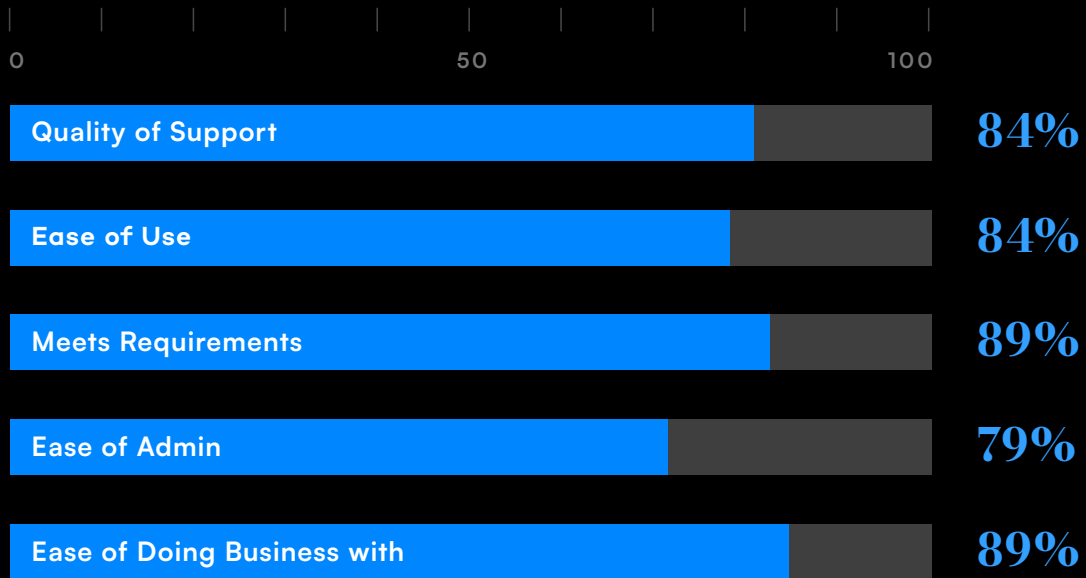
Natively built on the Salesforce platform, Certinia PS Cloud gives professional services leaders and teams unprecedented visibility into sales, service delivery, and finance.

With Certinia, you can:

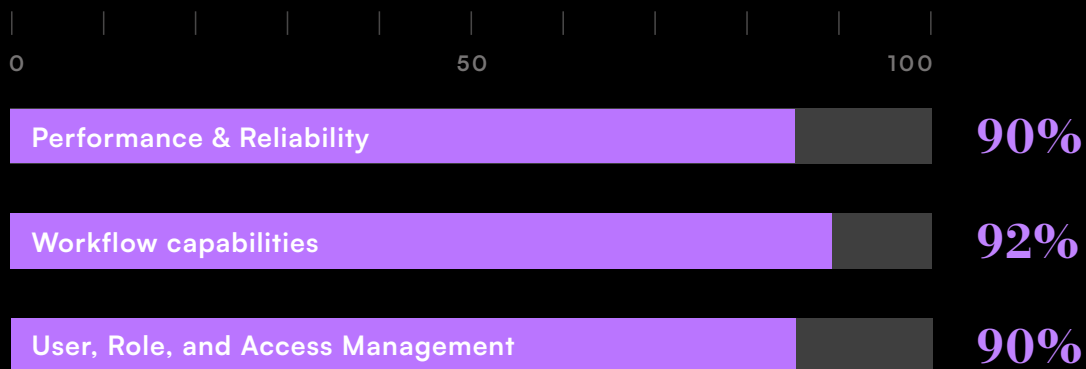
- **Get full pipeline, project, and resource availability**
- **Schedule the right people to the right jobs at the right time**
- **Make data-driven decisions with embedded analytics**
- **Empower road warriors with built-in mobile and social**
- **Get a complete view of project financial health**
- **Deliver the best estimates to win more profitable business**



## Certinia Satisfaction Ratings



## Highest-Rated Certinia Features



## Trusted by 1,300+ customers large and small

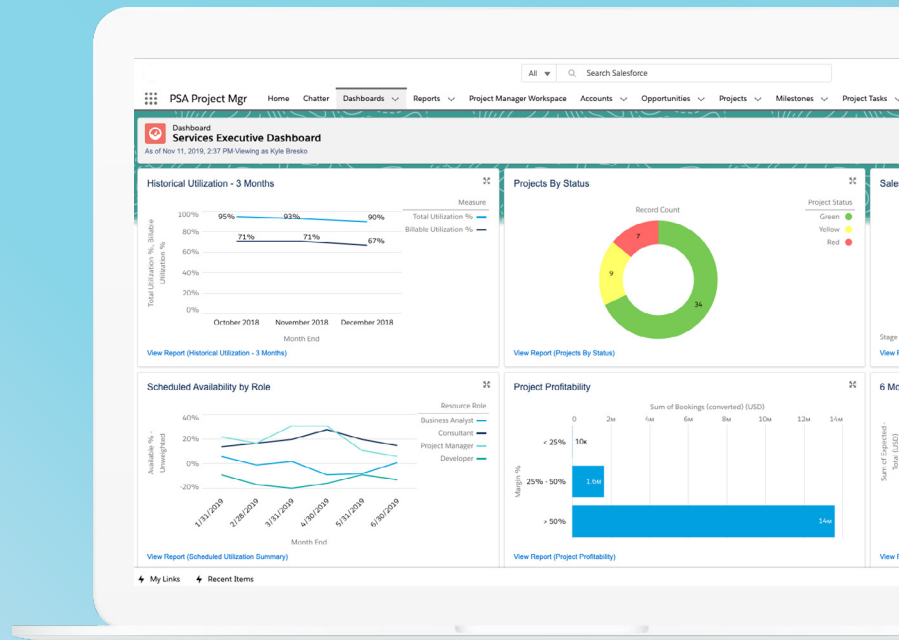


# Certinia enables us to consistently deliver standardized and simplified services to our customers. ”

**Adam Jones**

HPE Pointnext Services Delivery,  
Hewlett Packard Enterprise

[SEE STORY](#)



# Experience Modern PSA

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.

[LEARN MORE](#)

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