

The Ultimate Guide:

Becoming a customer- centric organization

Get a complete, unified view of your
customers and business with Certinia

DELIVER WITH INTELLIGENCE



certinia

Introduction

Put customers at the center of everything you do

Every organization strives to be more customer-centric, but few actually achieve it. To truly be customer-centric, organizations must put their customers at the center of everything they do—from a cultural standpoint, from an organizational standpoint, and throughout key systems and processes.

The businesses that thrive today are the ones that engage customers directly and in a personalized way at every touchpoint in the business, from the front-office to the back. Businesses that can react swiftly to market conditions, identify new revenue streams, and unlock critical customer insights require a nimble ERP system that enables them to be adaptive to their customer's needs.

Certinia offers the leading customer-centric business applications on the Salesforce platform, helping organizations rapidly translate demand into new revenue models, run more predictable business operations, and increase customer lifetime value.

Unlike other applications, Certinia's leading ERP and Professional Services Automation (PSA) solutions extend the value of your Salesforce applications (e.g. CRM, CPQ, and Tableau CRM) by seamlessly unifying sellers, professional services teams, and traditionally back-office professionals. Running your business with customers at the center empowers you with highly actionable and holistic insights at every step of the customer journey, ultimately driving business growth.

Solution Overview

Everyone gets that CRM is essential. But in today's customer-driven world, businesses also need a way to unify sellers with other key business functions, including professional services teams and traditionally back-office roles, such as accounting and finance to ensure every customer touch-point is accounted for.

Whether your company offers professional and business services alongside products, delivers products-as-a-service, or leverages a services-only business model, Certinia was built to solve your business needs.

ERP Cloud

- Accounting & Financial Reporting
- Subscription & Usage Billing
- Revenue Management
- Procurement
- Order & Inventory Management
- ERP Analytics
- ERP Community

Professional Services Cloud

- Services Automation
- Services Billing
- Services Revenue Management
- Services Analytics
- Services Community

Customer Success Cloud

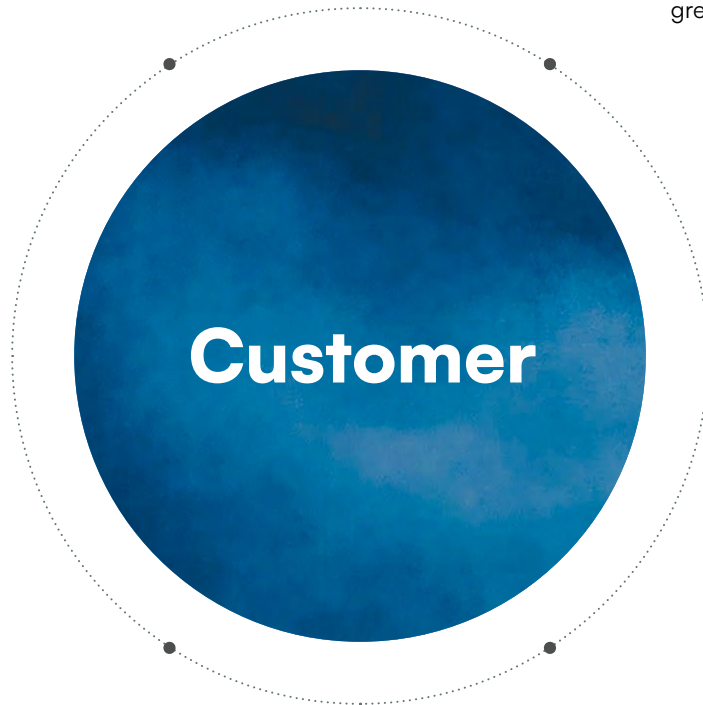
- Customer Engagement
- Success Playbooks
- Stakeholder Engagement

Run a connected business

Utilize digital technology and tools that unite all your physical business interactions.

Create innovative experiences

Empower employees with Salesforce apps and other modern technologies to produce great customer experiences.



Deliver with intelligence

Mine high-quality insights into your customers' success factors, anticipate their next move, and act swiftly.

Achieve agility and resilience

Your enterprise can rapidly adapt to changes while still innovating, driving transformation and getting to scale.

Traditional finance and accounting roles no longer pass muster. Digital transformation requires CFOs who can craft new business models, plan for agility, create outcome-based versus product-based offerings and identify new joint venture opportunities. ”

Ray Wang

Principal Analyst, Founder, and Chairman
Constellation Research, Inc.

Run a connected business

Cloud platforms, mobile technologies, the rise of the everything-as-a-service (XaaS) economy, the consumerization of IT—all these digital world factors have completely changed how business operates. Certinia empowers your teams with solutions that help your business to optimize efficiencies, tackle new business models, unite teams, and delight customers.

Back office built for growth

For small and midsize companies, Certinia is an enterprise-grade system built to grow with you. For larger enterprises, Certinia is perfect when you want to support a specific business unit or new acquisition, or when you need to integrate a modern, agile billing and revenue management solution with your primary financial system of record. In either case, Certinia can scale to handle multiple companies, multiple currencies, multiple charts of accounts (COAs), localized taxes, allocations, and more.

Subscription, recurring, and usage billing

Whether you are a professional services firm, a software or technology company, or even a business offering tangible goods as a service, Certinia makes it easy to close the books quickly and accurately. It's not just about making your finance team happy. It's also about giving your customers a seamless, personalized billing and invoice experience so they can process billing and payments the way they want—no matter the revenue stream. Certinia makes it easy, leading to increased customer satisfaction and renewal rates, reduced DSOs, and more accurate forecasting and reporting.

Compliance made easy

With all revenue sources flowing into the back-office AR system, you can improve cash flow while reducing errors and days to close the books. And with financial data automatically mapped to the same customer records in your CRM, pricing and performance obligations are consistently captured upstream, making compliance with new revenue recognition standards like ASC 606, IFRS 15, and AASB 15 even easier.

Maximum IT value

Point solutions are inefficient and expensive. Certinia enables you to manage your services business on the same platform as the rest of your business, lowering the total cost of ownership for your IT stack. In addition, having data in the same place allows you to optimize services metrics against other key business KPIs, providing more opportunities for cross-selling and upselling while maximizing IT value.

We couldn't live
without Certinia.
It's ingrained in
what we do. ”

Mark Conklin

Director of Operations

Salesforce

Innovative, collaborative experiences

Happy customers start with happy employees, and when it comes to systems and processes, a modern experience is a significant enabler of adoption, productivity, and satisfaction. That same modern experience must then be extended to each customer through tools promoting collaboration, information sharing, and self-service.

One platform for everything

Natively built on the Salesforce platform, Certinia gives you even more value when combined with the world's #1 CRM and cloud platform. Instead of maintaining faulty integrations and middleware, you can focus on serving customers and growing the business. Enjoy a modern, easy-to-use, scalable, trusted, and secure user experience, tap into AppExchange, the world's leading business app marketplace, and leverage the future of reporting and analytics with Salesforce Tableau CRM. Also, take advantage of collaborative, role-based workspaces and built-in customer communities that become a one-stop-shop for information sharing.

One customer lifecycle, one system

To build a customer-centric business, you must be able to manage the entire customer lifecycle on one system that delivers a single, trusted source of truth. Certinia makes this possible, capturing critical data at every customer touchpoint, from initial sale to product/service delivery to customer support to accounting and finance. Salespeople, services leaders, and finance teams can access the same set of customer, project, and financial data to better understand revenue and cost-related indicators of important customer accounts, driving better business decisions.

Predictable service delivery

Certinia brings predictability and efficiency to every stage of the services delivery processes from opportunity to staffing to project delivery, through to revenue recognition. As the leading PSA solution on the Salesforce platform, the application empowers services organizations to manage people, projects, financials, and customers in one integrated services application. Services professionals and finance leaders alike gain unparalleled visibility and unified datasets to manage resources and financials smarter and wiser, while tapping into powerful business forecasting.

Improved business performance

Having customer orders, project milestones, billing events, and accounting details in one place means your accounts receivable (AR) team has everything it needs to bill faster, collect sooner, and increase collaboration with sellers. By leveraging real-time sales pipeline and opportunity data across revenue streams, forecasting accuracy improves, in turn providing the overall business with insight into which customers are most profitable for different products and services, significantly improving downstream impact on margins and customer profitability.

Unlock customer insights

What happens when you unlock customer insights and your business becomes customer-centric? You see your customers in full color. You understand their motivations, needs and wants better than the competition— so you can create and deliver uniquely resonant experiences to them. Here's how Certinia delivers on that promise.

Single source of truth

With the single customer account record as your single source of truth, you get full visibility into the entire customer lifecycle from opportunity to renewal. That means every business process and every report can be a part of the same system. Eliminating integrations and points of potential failure, you'll have more confidence in the fidelity and accuracy of your data and reports.

Out-of-the-box reporting

Bringing together real-time data across every customer touchpoint and any or all of your revenue streams, our analytics give you meaningful insights into future operational and business performance. Going beyond the basic business intelligence (BI) toolset, Certinia delivers out-of-the-box datasets, dashboards, and reports powered by the leading BI platform, Salesforce Tableau CRM. Users can also combine flexibility with power by quickly and easily creating financial statements from scratch or template. And with an eye to the future, we're continually developing new reports, including role-based analytics, to increase the value of your investments.

Faster insights

With analytics on the same platform as your ERP solution, you don't have to continuously reconcile disparate databases to achieve powerful, meaningful customer insights. Not just accurate, reporting also happens swiftly, even with sophisticated, multidimensional analysis across millions of data points. Managers can personalize global and detailed views into individual transactions and invoices—all within the same Certinia experience—and easily identify opportunities in order to affect within-quarter performance.

By better capturing customer data, we've boosted organizational efficiencies and saved approximately 38 hours per week. Plus, it's brilliant having a single-entry point for various currencies. ”

Beulah D'Souza

Senior Finance Manager

George Clinical

Achieve agility & resiliency

As businesses grow, trustworthy customer insights are the key to enabling enterprise agility. From quickly spinning up new business units to individually handling each customer's unique financial relationship, companies that organize around their customers are built to withstand and capitalize on change. Here's how Certinia brings agility and resilience to your business.

Speed to market

Legacy ERP systems—and even many SaaS solutions—are still built solely for physical products and optimized for discrete manufacturing enterprises with linear business processes. But Certinia is a different kind of system, giving you the flexibility and agility to deliver new service-based offerings or service-product blends to quickly address customer needs. Whether you deal in complex, subscription-based contracts, fixed-fee services, or a simple widget, all sources of revenue can be accommodated.

Complete view of your business

With everything built on the Salesforce platform, services leaders and teams achieve unprecedented visibility into sales, services delivery, and finances, reducing time to bill and speeding up revenue recognition. You can improve customer satisfaction, empower teams with real-time project insights, and tap into powerful business forecasting to grow profits.

Enterprise-grade analytics

Speed to insight is critical in today's fast-changing business environment and always evolving customer expectations, making analytics a key part of any ERP buying decision. But you don't have to hire an army of data scientists or buy expensive third-party tools and data warehouses to glean meaningful business insights. With revenue and cost data for all your revenue streams in one place, Certinia eliminates error-prone, cumbersome spreadsheets and provides powerful, holistic analytics at a fraction of the cost of standalone enterprise BI applications.

Less risk, greater power

Trusted by more than a thousand global companies, from household names in the enterprise to small and medium-sized businesses, Certinia is built to deliver enterprise performance. Tap into powerful out-of-the-box features, and then rapidly extend and personalize the solution to your specific needs. With the #1 cloud platform underlying your most critical business processes, you can confidently reduce risk while empowering your teams to be even more successful.

With workflow efficiencies, automation opportunities, and integrated data driving business decisions, Certinia does not feel like additional cost but more like a cost-saving exercise for our organization. ”

Dan Paget

Chief Solutions Officer

Jellyfish

Experience Customer Centricity

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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