

Building the platform for a modern high-tech business

How to deliver the foundation for business certainty



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Introduction

A business platform fit for the future, with the customer at the centre.

The high-tech businesses that thrive in the future will possess two key characteristics. First, they will deliver with certainty for their customers, engaging in a personalised way at every touchpoint in the business, from the front office to the back. Second, they will be able to successfully pivot to ensure business profitability. In a turbulent market they must be able to react swiftly to market conditions, identifying new revenue streams, and unlocking critical customer insights. This requires software tools that enable you to deliver more, with less — nimble business applications that empower your business to adapt continually to changing customer needs and new business opportunities.

The tech industry is renowned for being incredibly innovative. In recent years the demand for new services and revenue streams has ballooned and this has required the increased reliance on the systems that underpin the business. Unfortunately many of these legacy solutions were built for simpler times, and are not able to support more complex business models such as managed services, subscriptions and usage-based contracts.

If your company delivers products-as-a-service, offers professional and business services alongside products, or leverages a services-only business model, you need a platform to run your services business. Certinia was built for you.

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. ”

Constellation Research, Inc.

Ray Wang, Principal Analyst, Founder and Chairman

The need for change

As a high-tech organisation you know more than most about how solutions and platforms can transform a business. However the in house tools that have helped you create success to date — may no longer offer the flexibility, scalability, and functionality that you need to support the next stage in your journey.

Outgrowing software and systems as your business matures and overcomes organisational challenges, is a natural part of growth. Your systems must evolve to cope with the administrative and financial issues that are a natural consequence of scaling a business. They need to provide a platform for the future that is flexible, reliable and resilient, one that does not act as a barrier to growth.

A modern digital business relies on two components:

First, a suite of connected business applications capable of delivering all the functionality required to run the enterprise. These applications should enable the organisation to translate demand into profit, run more predictable business operations, and rapidly introduce new revenue models to keep ahead of customer and market opportunities.

Second, a secure and robust technology platform that can be trusted to underpin the business and enable it to grow, adapt, evolve, and flourish. Such a systems landscape must be designed for the future and all the challenges and opportunities that it presents.

Everyone understands that customer relationship management is essential, but a modern high-tech company also needs a way to unify the entire organisation around a common source of information. It should embrace all the key business functions including sales, professional services delivery, customer success and traditional back-office roles, such as accounting and finance. This will provide real visibility across the enterprise and ensure that every customer touch point is accounted for. The result is better business decision making, improved forecasting, increased customer satisfaction and assured profitability.

We are in the business of digital transformation, so we must lead by example. Certinia allows us to provide a seamless experience at scale for both our customers and our teams.99

Hewlett Packard Enterprise
Adam Jones, Strategist

The platform for a modern high-tech services business

Run a connected business

Utilise digital technology
and tools to automate
and unite all your
business interactions

Ensure engaging experiences

Provide simple yet
compelling tools to
empower employees
and produce great
customer experiences



Deliver with intelligence

Mine high-quality insights
into your business drivers
and customer success
factors for effective
decision making

Achieve agility and resilience

Rapidly respond to
changes while still driving
innovation, transformation,
and scalability

1

Run a connected business

Cloud platforms, mobile technologies, the rise of the everything-as-a-service (XaaS) economy, the consumerisation of IT — all these digital world factors have completely changed how companies need to work. The high-tech sector is at the forefront of this change, operating at speed in a market that is fast growing and very competitive.

Certinia provides a suite of business applications that enable you to embrace these industry challenges and empower your teams to optimise efficiencies, tackle new business models, collaborate more effectively, and delight customers.

They are designed to:

- Address the needs of a growing, services centric, high-tech business
- Deliver seamless automated business processes across the company, from opportunity to renewal
- Provide information in a manner that is transparent, insightful, and compliant
- Scale and evolve as your business grows and thrives with a technology platform that is flexible enough to address the needs of the future
- Deliver the most attractive return on investment and compelling total cost of ownership

2

Ensure engaging experiences

Happy customers start with happy employees. When it comes to systems and processes, high-tech companies know that providing a modern user experience is a significant enabler of effectiveness and personal productivity. That modern experience must then be extended to customers and partners through tools promoting collaboration, information sharing, and self-service.

Your business applications platform should enable you to:

- Offer simple and easy to use systems that maximise adoption and user satisfaction
- Provide personalised experiences tailored to the needs of individuals, tasks, and roles
- Share, communicate and innovate with both customers and team members
- Deliver all the information and tools to do every job effectively, through a single 'pane of glass'

3

Deliver with Intelligence

What happens when you unlock customer insights and understand the drivers of profitability? You can optimise the utilisation of your resources and both find and address issues of revenue leakage. You gain comprehensive views of your customers, ensure the cost to service their requirements is correctly understood, and enhance their lifetime value to the business. You will understand customer motivations, needs and wants better than the competition, and deliver compelling business propositions with operational certainty.

Certinia and Salesforce combine to:

- Provide a single source of the truth across all your customer, operational and financial data
- Deliver complete visibility across the entire customer lifecycle from opportunity to renewal
- Enable out-of-the-box reporting from real-time data through personalised dashboards and reports
- Rapidly create financial statements from scratch or from templates, to enable sophisticated, multidimensional analysis across millions of data points
- Provide a controlled platform for budget setting and financial planning

4

Achieve agility and resilience

As businesses grow, trustworthy customer insights are the key to enabling enterprise agility. Companies that organise around their customers are built to withstand and capitalise on change, from creating new business units quickly to handling each customer's unique financial relationship individually.

Certinia brings agility and resilience that enables you to:

- Support all sources of revenue from complex subscription contracts, usage-based billing, T&E arrangements for professional services delivery, fixed fee managed services, to the delivery of a simple widget
- Provide a consolidated view of data from across the business
- Forecast more effectively with revenue and cost data for all revenue streams in one place, improving outcomes, and eliminating error-prone and cumbersome spreadsheets
- Prepare accurate resourcing plans by matching capacity with future demand
- Deliver new service-based offerings or service-product blends to quickly address changing customer needs

We are constantly evolving and scaling our business, and Certinia is enabling that activity. Everything flows into the accounting system and allows us to efficiently manage the back end of our professional services process as well. ”

Traction On Demand
Mike Epner, President

One digital platform

A digital platform acts as an enabler for the modern high-tech business and underpins every services enterprise.

It offers one technology environment to manage the entire operation and delivers 10 critical attributes:

One source of the truth

One scalable solution

One secure environment

One 'look and feel' to navigate

One system to learn

One set of workflows, approvals, and business rules

One database to support

One set of reporting and analytical tools

One collaboration tool

One ecosystem of development partners

A few words to finish

There comes an inflection point for every business where old ways of working, planning, thinking, and running the business must give way to new ones. Such points come faster in high-tech than in any other sector.

With connected information and synchronised systems that span sales, operations and finance, everyone on your team can play their part in enhancing the business and building amazing customer experiences.

This cannot be achieved without a holistic approach and democratised data that connects your customer clearly and transparently to every area of the business. It must span sales, service delivery, and back-office teams like accounting and finance, as well as traditional relationship owners such as customer success. It requires constant alignment, real-time and future insight into every facet of the customer experience and its relationship to business profitability, strategy and growth.

Technology pervades the lives and businesses of every one of your customers. Now your customers must pervade every aspect, department, and activity of your technology business.



Experience Modern Delivery

Certinia elevates business growth through a complete Services-as-a-Business (SaaS) solution spanning service delivery, finance, and customer success. Run on the leading cloud platform, Salesforce, Certinia enables organisations to run a connected business, deliver with intelligence, and achieve agility at scale.

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