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# Services Estimator: Winning quotes means winning business

Generate fast, accurate services estimates from a single source of truth

## **Services Estimator: the cure for the common quote**

What do you call your services estimate? A “bid”? A “quote”? “Estimate”? “Proposal”? Whatever the label, you’re looking to accomplish a single goal: a quick, accurate, transparent proposal that the client will approve.

But creating an accurate quote quickly can be a real challenge, especially when it’s complex. You’ve got to calculate costs, determine resource rates and availability, choose contractors or partners and onshore/offshore options, apply appropriate discounts, create scopes of work, provide multiple alternative bid options and capture target margins — all while adhering to your company’s methodology and business policies.

Now consider your sources for all this data: a disorganized range of meetings, emails, spreadsheets and other various and sundry documents, all with differing degrees of accuracy, currency, and reliability. No wonder the estimating process is so fraught.

## **The better way: a single source of truth**

Poring through multiple spreadsheets and other sources is no way to craft and deliver timely, accurate project estimates in 2023. Today, with complexity ever on the rise, what's required is a cure for the common quote — a single source of truth that contains all the data you need on one platform.

This is what the Certinia Services Estimator solution delivers. Having a single-source estimating platform gives you visibility and control over the entire quote process. It speeds the modeling of resources, rates, pricing, discounts, and expenses. So time pressure is put in its place, and you can prioritize both the customer experience and profitable engagements.

## **The Benefits of Certinia Services Estimator**

- 1.** Quicker, more accurate quotes
- 2.** Better resource planning and forecasting
- 3.** Accurate costs and higher margins
- 4.** Faster quote to cash
- 5.** Connected process with no integrations
- 6.** Fewer errors, no duplication of data
- 7.** More wins

## **Add services to your Salesforce estimates**

Certinia Services Estimator is the perfect, seamless complement to Salesforce CRM and Certinia PS Cloud — adding accurate estimates to Salesforce Opportunities based on current rates and other services information.

If you currently use Salesforce to quote products, maintenance, and warranties, simply use Services Estimator to create and publish professional services estimates to the same quote, with no integration required. You have both options: services estimates integrated into Salesforce Sales Opportunities and Salesforce CPQ-generated quotes.

Moreover, once your estimate is accepted, it flows to Certinia Professional Services Cloud to automatically initiate a professional services automation delivery project from the quote — including all the details, tasks, and resource requests.

“Services Estimator delivers a very agile, intelligent approach to one of our biggest disconnects: how do we get services estimating into the Salesforce platform and allow our resources to utilize that in a very simple, efficient, scalable way. ”

**Mark Conklin**  
Senior Director, Operations  
Salesforce

### **Faster estimating for quicker wins**

A key to winning business is swift turnaround of services quotes that build into compelling SOWs. Services Estimator surfaces the information you need to make that happen — quickly. Choose from real-time data for resources (contractors, partners, onshore, offshore), roles, skills, availability, geography, rate cards, and more.

### **Tight sales/services/planning coordination**

Faster, more accurate estimates aren't only good for winning business; they're also a godsend, keeping everyone in your organization on the same page, with a single customer record. Sales and services delivery can, finally, be in sync. So can capacity planning, as your resource managers gain early visibility into demand for resources, then use Services Estimator to identify the right project team to feed directly into PSA resourcing. That makes capacity planning and forecasting key metrics such as margin, utilization, and revenue simpler and more accurate.

### **Understand costs...and margins**

Perhaps you've noticed: Today's clients demand cost transparency to prevent unpleasant surprises and equally unpleasant billing conversations (or worse). Services Estimator enables you to keep a close eye on project costs on both the line-item and summary level. That maximizes your quote-to-cash funnel. It also makes it easier to manage the symbiotic relationship between project costs and profit margins.

**Deal structure, pricing and staffing all require tight integration between CRM and PSA applications to ensure sales and service delivery are in synch, focused on the right opportunities that take best advantage of skills, capabilities and resources. ☯☯**

**Jeanne Urich**  
2022 SPI Professional Services Maturity™ Benchmark Report

## **A digital template**

Creating estimates shouldn't involve starting from scratch every time — especially when quick turnaround is of the essence. With Services Estimator, you can produce digital best-practice templates automatically from template libraries. Simply click for a previous quote template to build on and retain experience in the business.

Choose optimal available resources and select from an array of quote options, such as line-item or summary discounts, scopes, margins, etc. When you can use a template to initiate an estimate with a click, that quote is not only fast, but also less prone to errors and omissions.

## **Winning quotes win business**

Are you ready to increase your project win rate, reduce time-to-quote and quote-to-cash, and achieve higher margins? All it takes is a single source of truth for all stakeholders to reference — Services Estimator from Certinia. Run on the leading cloud platform, Salesforce, Certinia delivers a complete Services-as-a-Business solution to enable organizations to run a connected business, deliver with intelligence, and achieve agility at scale. Contact your sales representative for details.

What are you  
waiting for?

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