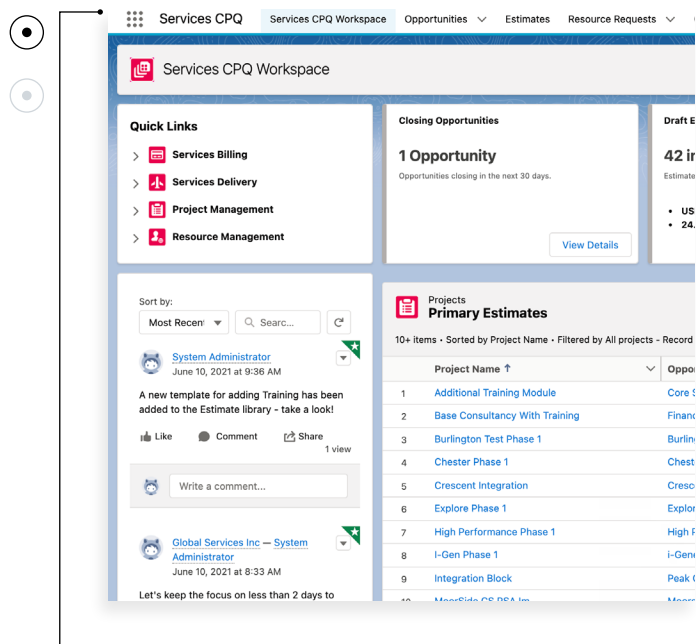# certinia

Services Estimator

Introducing Services Estimator, a solution that brings together all of the information you need to produce the best estimates for your customer.

Produce the most compelling and accurate estimates, faster.

Preparing new quotes and estimates can be quite a challenge. It involves bringing information together from multiple sources, ensuring that bids are both competitive and profitable while also compliant with your company policies, business goals, and financial targets. Estimating is vital for business success, yet many companies still have to rely on using spreadsheets and other bespoke developed systems. No more!

Speed, efficiency, and experience

Estimates are produced automatically from a library of templates to enable a fast start to the estimating process, based on best practices or constructed manually, as needed. Personalized templates enable you to address the varying needs of different practice groups and geographies. In addition, previous estimates are also available to ensure that experience is retained in the business. As a result estimates can be initiated more rapidly, taking full advantage of practical knowledge and with less opportunity for errors and omissions.

Delivering the best estimates

Producing the most compelling estimate is an iterative process and you need to simultaneously balance multiple factors. The proposal needs to be commercially attractive and competitive for customers. It needs to accurately reflect the cost of undertaking the work. And it needs to ensure that your margin targets are being achieved. Services Estimstor provides you with all of the information that you need in one place. It enables you to easily model resourcing, prices, discounts and expenses to produce the best result for you and your customer. You can maintain and view multiple versions of estimates while at the same time keeping control over the whole process.

Achieving targets and staying compliant

Once estimates have been prepared it is essential that they are compliant with your business rules and targets, which may of course vary for different markets. This means that estimate approvals need to be made in the most appropriate manner, by the correct people. In addition it requires complete visibility and traceability of every step in the process. Financial limits and tolerances enable simple approvals to be processed rapidly, without delay, and for specialist executive time to be focused on more complex work and commercial exceptions.

Matching capacity and demand

Estimating is not just about the finances, you also need to ensure the availability of resources to successfully deliver the project when you do win the business. Services Estimator brings together roles, bill rates, and costs rate to make the best estimating decisions and then auto populates resource requests onto the Opportunity within CRM. This gives you visibility into demand and enables you to proactively plan capacity to match. This ensures that your services delivery teams are fully prepared for your future business.

Smooth and seamless processes

Certinia Services Estimator complements your existing Salesforce estate beautifully. Built on the same platform, there are no interfaces to maintain, no handoffs between one function and another, and as a result processes can be automated, error free, and without time delays. Estimates can be initiated directly from an opportunity. Critical data such as roles, bill rates and costs, that is already held within Certinia Professional Services Cloud, can be applied automatically without need for duplication. Estimates once completed can be seamlessly passed back to the opportunity, or Salesforce's CPQ offering. And once the business is closed, a project can be initiated instantaneously with all of the information that you require. Speed, accuracy, and efficiency, the cornerstones of a truly powerful estimating solution for any professional services team.

Taking the next step

If you have a professional services team that relies on Salesforce to run your business, Certinia Services Estimstor is the most effective way to provide a healthy pipeline of compelling estimates. For more information please:

- Contact your Certinia Account Rep or
- Call **1-866-743-2220** or
- Visit **www.Certinia.com**

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