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Certinia AI

AI models that deliver real-world benefits to services businesses

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AI has become the consuming passion of today's business world. And for good reason: It's rapidly becoming a crucial element for staying competitive and efficient.

For services businesses in particular, the integration of AI into core operations, like services delivery and resource planning, is already transforming how they automate, survive…and thrive.

What exactly is the right path to AI for services businesses? One lined with pragmatism. That is, employing AI not just for its own gee-whizzery sake, but to achieve actionable, real-world business benefits that show up on the bottom line. This is the difference between experimental, expensive AI…and Certinia AI.

Employing AI not just for its own sake, but to achieve actionable, real-world, bottom-line business benefits

From 'gee whiz' to 'gee, this works'

Certinia AI is changing how global mid-sized enterprises address the challenge of adopting AI into their finance and professional services operations. By leveraging curated datasets and closed-loop AI models, Certinia AI enables business leaders to unlock hidden insights, predict trends, and make informed decisions that can:

- Optimize services margins
- Forecast cash flows
- Allocate staffing
- Manage business risks
- Drive growth
- Streamline operations

Certinia AI

Combining machine learning models with an end-to-end AI platform for financial, accounting, and operational data, Certinia has developed a suite of AI models that enable a services businesses to achieve new levels of efficiency and accuracy in three critical business processes: forecasting cash flows, keeping projects on schedule, and optimizing profit margins.
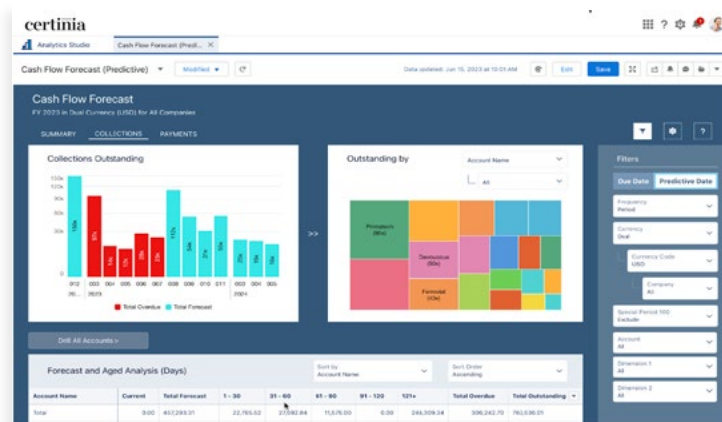
Cash Flow Forecast

To understand the impact of operational and financial changes, you need to be proactive in managing and optimizing cash in the business. But how can you accurately forecast cash flow when you aren't certain when your customers will pay you?

Certinia's Cash Flow Forecast solution leverages AI, distributed analytics, and machine learning to identify each customer's payment trends — and predict their days-to-pay. That data is then fed into a simple cash flow forecast dashboard that gives you visibility into inflows and outflows for future cash flow predictions.

With Cash Flow Forecast you can:

- Reduce risk in the business with predictability
- Understand the cash flow impact of actions to increase revenue and reduce costs
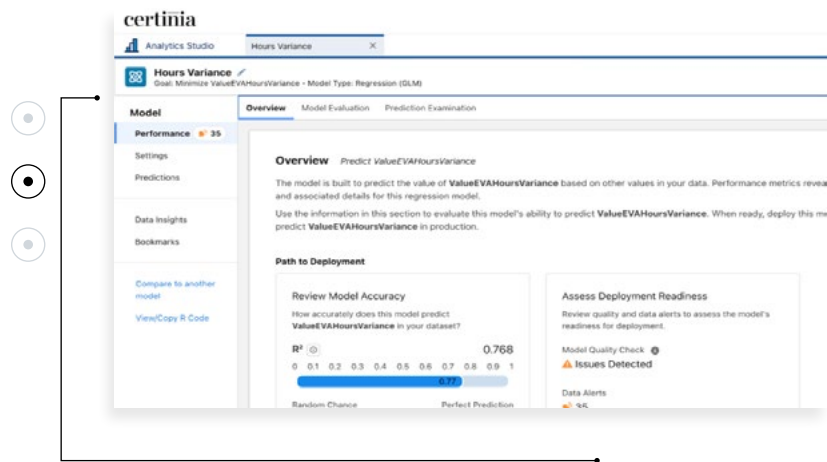- Forecast cash flow more accurately and improve DSO and cash flow

Schedule Optimization

Is the project on schedule today? What about next week? Next month? What are the potential hazards up the road that can detour the project and jeopardize timely delivery? With Certinia's Schedule Optimization solution, project managers have an early warning system to warn of potential risks to scheduled work, based on historical performance.

Schedule Optimization uses distributed analytics and ML models to identify possible project bottlenecks and roadblocks — even breaking them down by role and region. Then it provides actionable insights and recommends proactive steps on how to mitigate those risks. With that info, delivery leads can adjust schedules on project templates to better reflect how projects are delivered.

With Schedule Optimization, you can:

- Reduce costs by improving utilization
- Keep projects running on schedule for on-time delivery
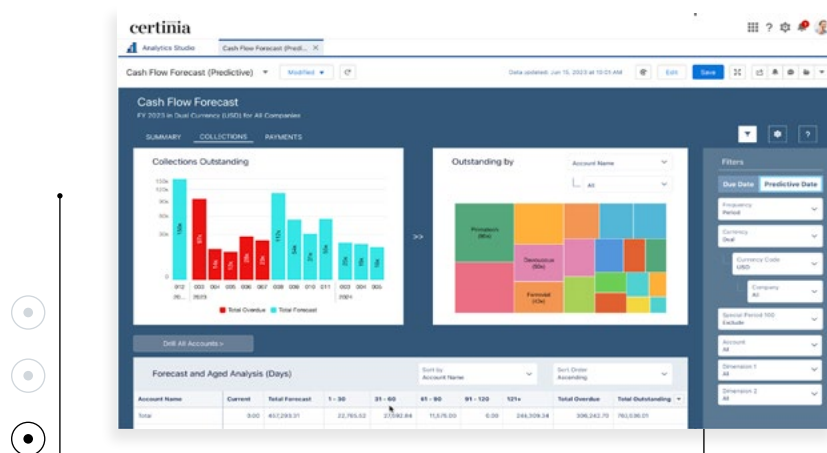- Mitigate risks and optimize profit margins

Margin Optimization

It's a nagging thought in the back of every services business leader's mind: Are our projects realizing their full profit potential? It's a valid concern. Project planning is complex work, prone to chronic under- or over-estimates of costs — leading to unpredictable margins.

Certinia's Margin Optimization solution offers an early alert system to warn project managers of potential risks to planned margins. Based on historical performance, it employs AI models, distributed analytics and machine learning to provide insights into problem areas of planned margin (e.g., roles or regions), then make recommended areas for improvement on how to mitigate risks and optimize profitability.

With Margin Optimization, you can:

- Improve project margins, contributing to overall profitability
- Gain accurate project costing and contingency building
- Mitigate risks and optimize percentage margin value

Experience Certinia

Certinia (formerly FinancialForce) delivers a Services-as-a-Business platform that powers and connects all aspects of services operations, from services estimation and delivery to customer success management and financial planning and accounting. The company's Professional Services Automation (PSA), Customer Success, and ERP solutions—delivered on Salesforce's leading cloud platform—provide the ability to run a connected services business, deliver with intelligence, and achieve business agility. For more information, visit www.certinia.com.

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