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REASONS WHY PROFESSIONAL SERVICES WORKS BETTER ON THE SALESFORCE PLATFORM



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BRIDGING THE SERVICES AND SALES DIVIDE FOR SMARTER SERVICES DELIVERY

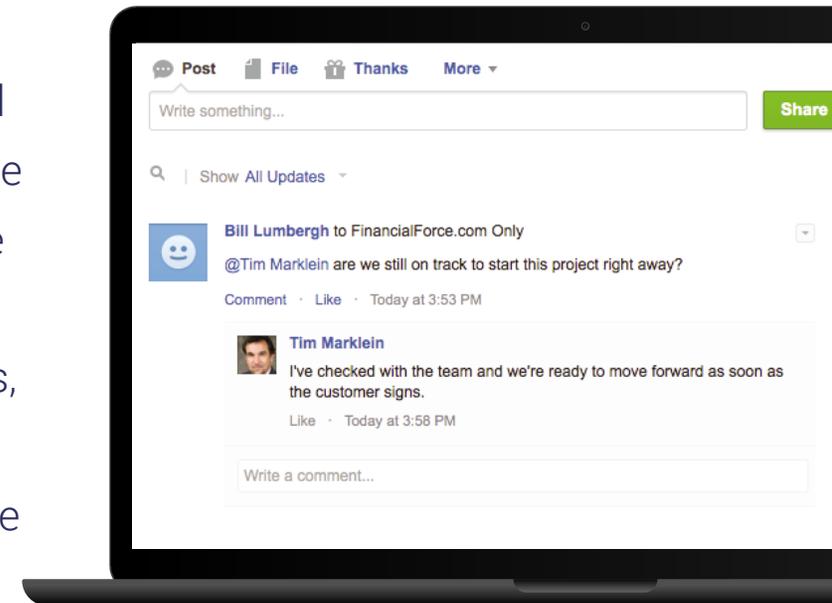
The Professional Services industry is in its fourth consecutive year of steady growth and not slowing down. If you are looking to grow your business it's crucial to evaluate your current systems and processes to ensure they are drivers and not road blocks. Are services and sales working together to build the right deals? Can you plan for future staffing needs? Do you have the visibility you need to keep projects on track? Continue reading and uncover the top 9 reasons why Professional Services works better on the Salesforce platform to help drive growth and bridge the services and sales divide for smarter services delivery.

1

SELLING SERVICES IS A TEAM SPORT

SELL WHAT YOU CAN DELIVER, DELIVER WHAT YOU SELL

If services is charged with delivering successful, profitable projects, then they need to be empowered to be part of the process to scope, plan, and price the deals. But too often services is not connected to the sales process or collaborating with the sales team on the deals. That leads to project staffing problems, causing consultant shuffling or the wrong skills brought to a job. When sales works together with the services team sharing data on the same platform, they work in unison and can focus on selling the RIGHT deals. Services wins because they can align the right project resources, work with customers to set proper expectations and are ready to deliver against a project plan created by subject matter experts. Sales wins because successful projects result in happy, referenceable customers (and more likely to win business down the line).



2

IMPROVE FORECASTING AND PLAN MORE EFFECTIVELY

COMBINE INFLIGHT PROJECTS AND YOUR SALES PIPELINE IN YOUR CAPACITY PLANNING

A single platform for both sales and services means that your forecasting and capacity planning can instantly pull data from both inflight projects and potential deals in the sales pipeline. Now your services organisation can perform informed,

insightful long term planning of revenue and staffing requirements that is rarely achievable if your sales data lives in one data silo and your inflight project data lives in another. The time needed to staff up or scale back your services capacity is measured in months and quarters where a single platform will give you that view well into the future which is required to plan effectively.

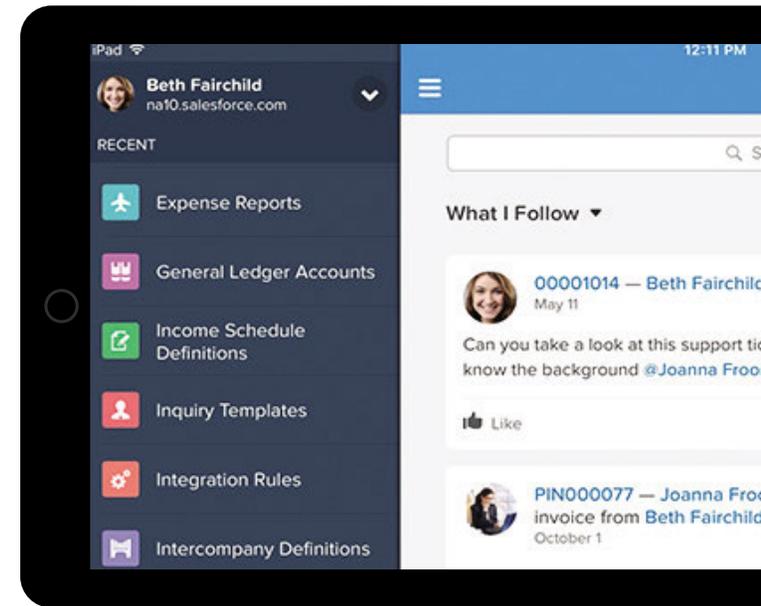


3

OPTIMISE PARTNER AND CUSTOMER INTERACTIONS

CREATE COMMUNITIES SO EVERYONE STAYS INFORMED AND IN THE LOOP

Services companies that can most effectively collaborate, share, and communicate with partners and customers will have the advantage. The Salesforce platform allows you to create secure online sites (communities) to expose relevant project information directly from the source, ultimately creating a project management hub. You will be able to share, store, and manage all your project related files in one central place and converse about them in real-time via Chatter. These communities will be equipped to provide all the visibility and info you need to create customer invoices, track vendor and subcontractor payments and ultimately keep costs down and margins on track.



4

BECAUSE NO TWO PSOs RUN COMPLETELY ALIKE

CONFIGURE SYSTEMS TO YOUR BUSINESS PROCESSES AND REQUIREMENTS

Your services organisation works like no other, so it shouldn't work within a technology box. The Salesforce platform makes it easy to implement and automate the business processes and requirements unique to you. That allows you to apply your services delivery processes and milestones/measurements across both sales and services - to help ensure consistency, engage the right resources and drive a better customer outcome. The platform also allows you to personalise systems in a manner you think will drive usability, encourage adoption and maximises the return from automation (think configurable forms, custom objects, label changes, workflow, click not code etc).



5

BUILD YOUR SERVICES STRATEGY ON FACTS, NOT GUESSWORK

POWERFUL REPORTS & DASHBOARDS WITH DRILL-DOWN AND ANALYTICS

Running a services business is hard. Running a services business without real-time, meaningful data is even harder. The Salesforce platform is equipped with powerful, flexible reporting tools to help get you the visibility and the information you need to

make smarter, game-changing decisions impacting margins, utilisation, KPIs and more. These reports are built to provide the drill-down and dynamic data to surface the data you need in the way you need it. For services, this speed of information allows for quick course corrections and creates more confidence to plan for the future.

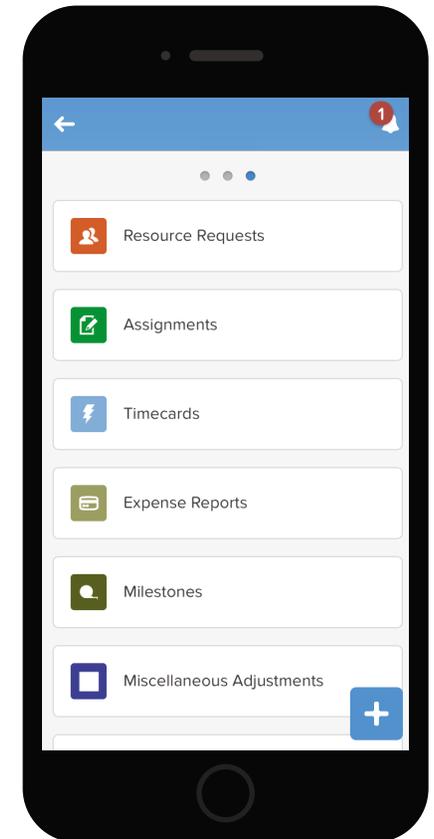


6

COMPLETE ON THE GO ACCESS FOR A MODERN SERVICES TEAM

MOBILITY OF EVERYTHING YOU NEED TO SELL, RESOURCE, DELIVER AND BILL YOUR PROJECTS

Whether you are running a team of road warriors or delivering projects remotely your services team members are working on their smartphones and tablets -embracing the latest mobile technologies to manage both their professional and personal lives. When your services organisation is running on the Salesforce platform, your team has mobile access to PSA data, reports, and documents that they have access to on their laptop or desktop machine in the office. That means you'll get complete visibility to sales activity, project delivery and billing from a single Salesforce mobile app along with in your pocket access to day-to-day reports, dashboards, documents, approval processes and social collaboration with your team and your clients.



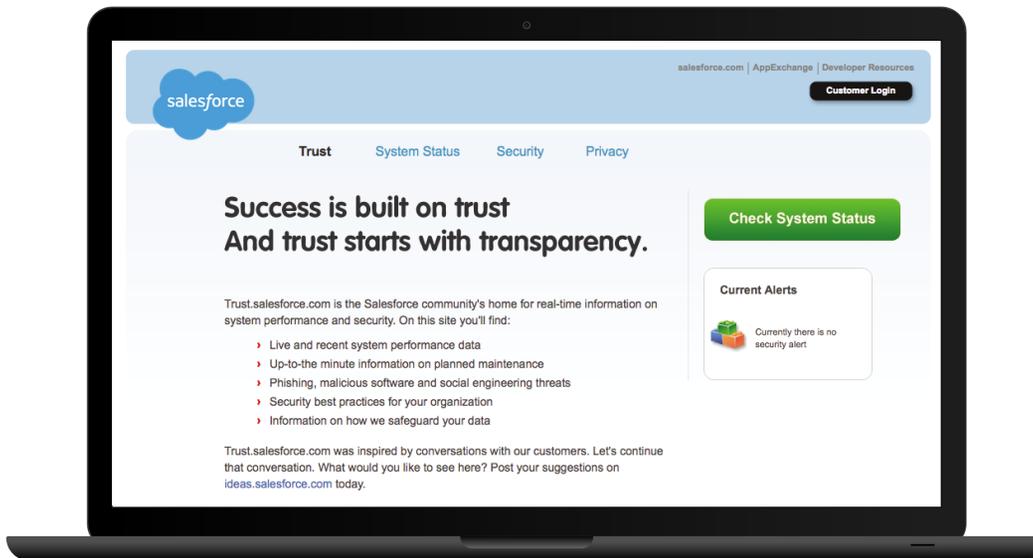
7

PROTECT YOUR DATA AND PREPARE FOR GROWTH

ENTERPRISE CLASS DATA SECURITY & PROVEN SCALABILITY

Salesforce provides a world class data centre infrastructure, protecting the business critical data of many of the world's largest organisations. You'll want all your project data protected by the same world class security best practices, physical data centre security controls, threat protection processes and data privacy certifications.

Get visibility to system availability and performance at trust.salesforce.com.
Why would you settle for anything less?



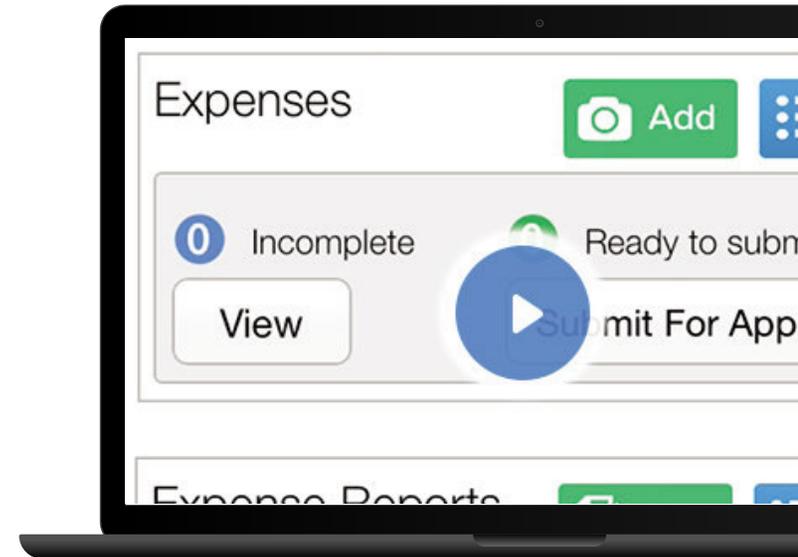
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MEET YOUR NEW POLICEFORCE

CENTRALISED APPROVAL ENGINE

COMPLIANCE AND POLICY MANAGEMENT

Consistent, demonstrable adherence to both your own company policies and the policies agreed upon with your customers is essential to ensure cost control and minimise billing disputes. The Salesforce Platform provides a world class enterprise approvals engine that allows you to define and monitor approval processes across your entire services organisation. It provides one place to define your organisation hierarchy, manage point-and-click multi-level approval rules definitions, automate non-erasable approval history audit trails and provide browser, tablet and mobile access for requesters and approvers. These approval rights can also be extended to customers and partners via the communities mentioned previously. Having one common engine for approvals means your teams have only one tool to learn, your managers can manage all their approvals from a single list and your auditors have one place to review policy documentation and to test compliance.

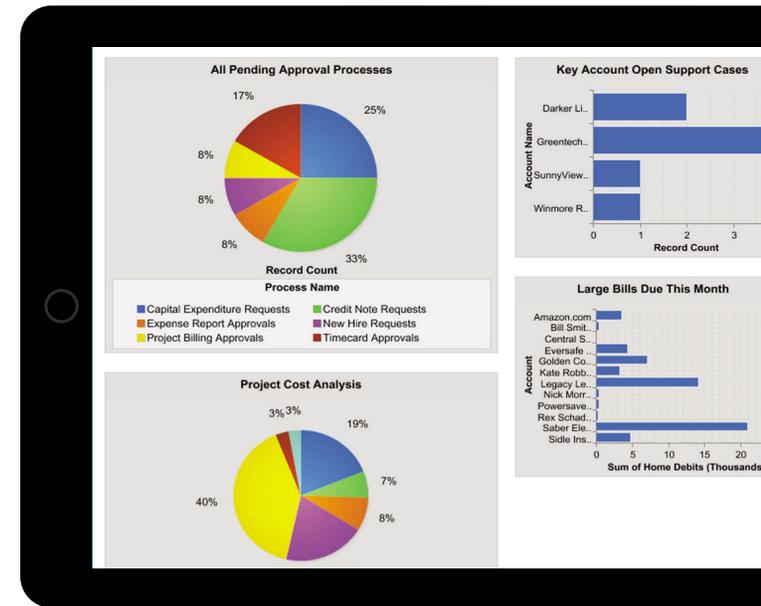


9

ACCOUNTABILITY IS BUILT INTO EVERY ACTION

ENTERPRISE CLASS AUDIT TRAILS

When audit time comes around you'll find that having your transactions, supporting documents, audit trails, approvals and conversations all in one place will shrink audit times, reduce costs and reduce the effort required to support the audit process. With all your opportunities, quotes, projects, timecards, expense reports and billing activity linked together in the same database your auditors can perform their step-by-step transaction walk-throughs by simply clicking from record to record. They can also view the entire project lifecycle from end to end including all attached explanatory backup and discussions between your team and your customers. It doesn't get any simpler or easily audited than that.



ABOUT FINANCIALFORCE

Founded in 2009, FinancialForce is the leading Cloud ERP vendor with apps built entirely on the Salesforce App Cloud. The company's Financial Management, Professional Services Automation (PSA), and Human Capital Management (HCM) offerings provide services-centric businesses with a platform that organizes sales, services, finance and HR entirely around their customers. Headquartered in San Francisco, FinancialForce is backed by Salesforce Ventures, Technology Crossover Ventures, Advent International and UNIT4.

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