



CRM

Sales
Service
Communities
Einstein



PROFESSIONAL SERVICES

Resource management
Project & Portfolio management
Project financials
Billing & Revenue Recognition
Time & Expense management



FINANCIAL MANAGEMENT

Accounting & Finance
Billing & Invoicing
Revenue management
Spend management
Inventory management



**TOP
WAYS
TO
WIN**

- 1.** Sell more Sales Cloud
- 2.** Sell more Service Cloud
- 3.** Sell more Einstein Analytics
- 4.** Sell more Community Cloud
- 5.** Sell more Sandbox licenses
- 6.** Expand your reach into your accounts



FINANCIALFORCE

YOUR GUIDE TO DRIVING ACV

	PROFESSIONAL SERVICES AUTOMATION 	FINANCIAL MANAGEMENT 
OVERVIEW	Gain the visibility and power to optimize professional services operations. Drive revenue growth, improve margin and deliver on the promise to the customer.	Streamline, simplify and automate financial operations. Measure profitability while understanding customers in real time.
SALESFORCE PRODUCT SYNERGIES	<ul style="list-style-type: none"> • Sales Cloud • Service Cloud • App Cloud • Einstein Analytics/AI 	<ul style="list-style-type: none"> • Sales Cloud • Service Cloud • App Cloud • Einstein Analytics/AI • CPQ
TARGET BUYERS	<ul style="list-style-type: none"> • C-Suite • VP/Director of Services • VP/Director of Operations • VP of IT 	<ul style="list-style-type: none"> • C-Suite • VP/Director Finance • VP/Director Operations • VP/Director Sales • VP of IT • Controller
COMMON PAIN POINTS	<ul style="list-style-type: none"> • Disconnected sales and services teams • Lack of visibility into: utilization, resource management, project management, portfolio management • Using spreadsheets to run services is no longer sustainable/scalable 	<ul style="list-style-type: none"> • Disconnected sales and finance teams • Data entry is manual, time consuming and prone to errors • Current system can't support business growth (spreadsheets/legacy systems) • Complex reporting requirements (Struggling to get the financial information they need.)