

## Introducing...FinancialForce PSA

Services are a large and growing part of the global economy, but have not been well supported by traditional enterprise applications and technologies.

FinancialForce PSA harnesses the power of cloud computing and, more specifically, Force.com and Salesforce CRM to finally meet the needs of services organizations, offering...

- ... an end to the disjointed processes, unshared information and unreliable, inconsistent manual workarounds caused by poorly integrated niche applications, spreadsheets and home-grown systems.
- ... an end to the fragmented communications between sales and services, reducing the need for conference calls, emails and unbillable meetings, just to keep distributed and virtual team members “connected”.
- ... an end to the poor visibility that leaves management struggling both to know how the business is really doing today and to anticipate what the future will bring.

You get the benefits of native integration with Salesforce CRM and the scalability and flexibility of the world’s leading enterprise cloud platform. And – just as thousands of services companies have found by using Salesforce CRM – FinancialForce PSA focuses your IT spending on applications, not technology management.



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“ Based on our benchmarking of over 400 service organizations, we’ve found that those who closely align sales and service processes are able to drive significantly higher utilization (81% vs. 74%) and project profitability (34% vs. 25%). For us, there’s no doubt that sales and service alignment is the new revenue engine! ”

**David Hofferberth**  
Principal, SPI Research

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### Align sales, services and finance around the customer

FinancialForce PSA takes a customer-centric approach that starts with opportunities and seamlessly progresses through the hand-off to services, through project delivery, billing and cash collections. It is literally embedded in Salesforce CRM, enabling sales teams to get real-time visibility into each project’s status, resource availability and project history. At the same time, consulting managers have forward visibility into the pipeline, so the right resources can be assembled at the right time and expectations can be met. And management benefits from a complete view of the business from beginning to end and top to bottom.

### Technologies for teamwork

The highly accessible Salesforce cloud technologies offer ideal advantages for services-based companies. For instance, the platform enables FinancialForce.com to be on one line to leverage a variety of mobile devices, customer portals, workflow engines, and analytic tools that support a “people-oriented” business 24x7. This includes Chatter, the social medial application that brings Facebook-like collaboration functionality to project delivery. It allows sales and project team members to create project chatter groups and discussion streams that can become more integral to a project’s success than the usual collection of timecard entries and project management activities.

### One team, one solution, one view of the customer

What all this means for your team is better visibility into: the pipeline; demand on resources; target start dates; customer interactions; active projects; issues and risks; billing details; and, best of all, a single view of the customer. And as Services Performance Insight (SPI) has recently documented, companies that have greater visibility achieve higher win-rates, utilization and services margins. Even better, you get these top-line benefits while lowering IT costs, creating a scaleable and flexible foundation for future growth, while keeping your customer at the center.

## Sales Collaboration – sales and services synergy

- One system, end-to-end on Force.com.
- Share the same customer account object.
- No more silo-ed data.
- Sales visibility into customer projects.
- Service visibility into opportunities.

## Services Handoff – be proactive - start projects the right way

- Convert opportunities into projects in a single click.
- Eliminate unnecessary re-keying and system interfaces.
- Proactively plan resources and schedules.
- Involve the services team in the sales cycle at the right time.
- Resource requests and soft booking of resources.

## Resource Management – put the right people on the right projects – every time

- All resource details tracked in one location.
- Team visibility to scheduling and assignments.
- Intuitive views into availability and capacity.
- Skills & certifications matrix.
- Skills catalogs and capacity planning.
- Multiple work calendars.
- Ability to do charge-backs.
- Effective dating.

## Projects & Portfolios – get the whole picture

- Region & practice portfolio management.
- Visual dashboards and forecasting tools.
- Utilization & backlog tracking.
- Fixed price and time and materials in a single project.
- Project accounting.
- Project hierarchies.
- Project governance.
- Services forecasting.
- Project status reporting and alerts.

## Time & Expense Management – intuitive, automated and efficient systems

- Fast, single-click timecard entry.
- Delegated time & expense entry.
- Flexible approvals and routing.
- Missing timecard alerts, based on region or practice.
- Expense limits & rates.
- Multicurrency expense.
- Secure, branded portal for vendor time and expenses entry.

## Billing & Invoicing – a flexible but controlled approach

- One click to generate billing events.
- Billing and invoicing data viewable on project.
- Visibility into what is ready to bill, has been billed and what has been invoiced.
- Vendor can submit invoices and get status through a secure portal.
- Easily reconcile vendor changes.
- Reverse invoices for vendors.
- No duplicate vendor charges.

- Align sales, services and finance
- Collaborate as one team; work as one team – Chatter enabled.
- Gain early visibility into new projects and demands on resources.
- Knock down the data silos – share a single view of each customer.
- Deliver actionable insight into data that makes a real difference.

### About us

**FinancialForce.com is the cloud applications company.**

We focus 100% on building business applications for Force.com – the world's leading cloud computing platform from salesforce.com. Our applications include Accounting, Billing, Professional Services Automation (PSA) and Services Resource Planning (SRP). We serve fast-growing organizations as well as dynamic enterprises, helping them to align Finance, Sales and Service in a way that enables profitable growth. We are backed by two of the biggest and best players in the business, UNIT4 and salesforce.com

To find out more about FinancialForce solutions, please contact us on: [sales@financialforce.com](mailto:sales@financialforce.com) or 866-743-2220.

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