

CBTS Technology Solutions connects what matters with FinancialForce on Salesforce



Industry: Telco

Company Size: Large

Headquarters: Cincinnati, Ohio

Products Used: Professional Services Automation, Financial Management, Order & Inventory Management, Procurement

Key benefits:

- ✓ Real-time visibility
- ✓ 50% faster time and expense reporting
- ✓ 360° view of customer



Legacy processes hamper growth

As CBTS Technology Solutions added applications over the years, it suffered from disjointed processes and data. It called upon a third party supply chain management (SCM) software to handle orders and manage inventory, along with a legacy accounting software for financials. Its basic SCM software lacked flexibility and reporting capabilities. The financial software met some, but not all needs, including integration with Salesforce. Combined, these issues meant their Infrastructure Practice was bogged down and the company was unable to hold the sales team accountable for forecasts. After relying on legacy systems, manual processes, and integration workarounds for years, CBTS Technology Solutions needed a more robust solution.

“FinancialForce gives us a lot more flexibility to meet our customers’ needs. We now have much more visibility into customer data, metrics and day-to-day operational insights. It’s a game changer.”

Daniel Menkins
Salesforce Supply Chain Product Owner
CBTS Technology Solutions

By implementing FinancialForce Professional Services Automation, Order, Procurement, & Inventory, along with Financial Management, CBTS Technology Solutions gained much-needed visibility and flexibility to support the next wave of company growth.

Nearly every department in the company relies on FinancialForce Financial Management and FinancialForce PSA. With full visibility into each account and the flexibility of the software, CBTS Technology Solutions can better and more quickly serve customers, giving it an edge over the competition and driving repeat business.



With standard workflows, checks and balances, and visibility in place, CBTS Technology Solutions has standardized and improved processes across the board. Empowered by the rules and validations built into FinancialForce software, the company can generate cleaner data and more insightful reports – which translates to better decisions.

Improved processes lead to higher employee satisfaction rates, which has helped with overall productivity. The nearly 4,000 users of FinancialForce PSA manage time and expense entries, a daily task which is no longer tedious and time consuming. The sales team of nearly 200 reps can now generate quotes and more quickly produce forecasts. Finance harnesses the integration between FinancialForce and Salesforce for better reporting and faster closes.



PSA Cost and Revenue Summary

ROLE	TOTAL HOURS PER ROLE	COST RATE	BILL RATE	EST COST	EST REVENUE
Business Analyst	60.00	60.00	150.00	USD 3,600.00	USD 9,000.00
Consultant	180.00	75.00	200.00	USD 13,500.00	USD 36,000.00
Project Manager	120.00	70.00	175.00	USD 8,400.00	USD 21,000.00
Trainer	40.00	50.00	125.00	USD 2,000.00	USD 5,000.00
Planned Hours And Estimated Cost and Revenue	400.00	68.75	177.50	USD 27,500.00	USD 71,000.00

Planned Costs	USD 27,500.00	Planned Margin	USD 43,500.00
Planned Revenue	USD 71,000.00	Planned Margin %	61.27%
Planned Hours	400.00		

Going forward, CBTS Technology Solutions plans to continue leveraging the flexibility of FinancialForce software on the Salesforce platform to successfully maintain existing business and acquire new customers.

Learn more

www.financialforce.com