# The AI Reality Check

## Continuity is your new competitive advantage

### Is your PSA executing the work, or just summarizing the chaos?

The professional services industry is at a crossroads. While leadership is under immense pressure to modernize with AI, most operational foundations simply aren't built to support it. True leadership in this Outcome Era isn't about chasing the latest shiny roadmap; it's about structural alignment—ensuring your AI operates on a unified platform where every tool shares the same customer view.

**Before committing to a vision that is still being built, use these five questions to see if your Agentic provider is delivering enterprise substance or just a clerical fix.**

# 5 Questions to ask your agentic PSA provider

## 01 Is your Agent an operator or just a scribe?

Many platforms lead with clerical AI—like meeting transcripts and summaries—that don't move the operational needle. Ask if their agents can execute at scale, such as autonomously staffing thousands of requests, enforcing budget caps, or proactively flagging missing timecards before they leak revenue.

## 02 Does your AI have a unified data view or a siloed view?

If your PSA isn't native to your CRM, the AI is operating in the dark. Ask if the AI can see demand in the sales pipeline before the deal is closed, or if it only reacts once a project is manually created.

## 03 Are your Agents rebranded workflows?

Be careful not to pay an AI premium for features like task dependencies and status updates that are actually standard, rule-based triggers. Ask which of these agentic actions can be handled by core product logic versus those requiring expensive generative AI credits.

## 04 Can your agents staff 2,000+ requests simultaneously?

Tools born in high-velocity software onboarding often struggle with the variability of complex enterprise services. Ask for proof that the AI can handle multi-step planning and massive resource management across thousands of users, rather than just small, repetitive projects.

## 05 How do you build trust in autonomous actions?

Agents that change project timelines or re-staff teams without human validation create chaos. Ask how the platform keeps "humans-in-the-loop," providing the transparency and validation needed to transition from predictive assistance to true autonomy.

# Strategic execution: The disconnected trap vs. the unified foundation

| Focus Area | The Disconnected Trap (Don't) | The Unified Foundation (Do) |
|---|---|---|
| Data Integrity | Don't rely on stitched-together systems that require manual coordination to bridge data gaps. | Do maintain a platform-native model where context is never lost during handoffs. |
| Forecasting | Don't settle for siloed snapshots that can't see demand until a project is already created. | Do leverage full-funnel analytics to see demand while the deal is still in the sales pipeline. |
| Risk Detection | Don't wait for AI to summarize a frustrated email after a project is already red. | Do use early-warning systems that correlate financial trends and sentiment to stop churn. |
| Resource Management | Don't rely on simple skill matching that ignores real-time availability across the business. | Do use agents that can autonomously handle extensions, reallocations, and finding alternate resources. |
| Operational Scale | Don't scale revenue by bloating headcount to manage the friction of fragmented tools. | Do use autonomous agents to handle repetitive execution, allowing experts to focus on outcomes. |
| Revenue Continuity | Don't manually reconstruct customer data from multiple systems for renewals. | Do automate revenue recognition and connect time tracking directly to the general ledger. |

# The Certinia advantage

As the [IDC Leader in AI-Enabled PSA](#), Certinia provides the enterprise-grade foundation that trend-chasers can't match. Our AI isn't a bolt-on; it is fueled by a unified data model that provides 360-degree visibility across your entire business—from the first sales lead to the final invoice. We focus on operational outcomes that move the needle today, ensuring the customer journey remains intact from first conversation to renewal.

## Ready to stop managing risk and start eliminating it?

Schedule a technical architecture review to pinpoint where your data context breaks today and identify the changes that will impact your bottom line.

**Schedule a time** ›

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