

10

Requested Hours

74.29%

Requested Margin (%)

Matched Resources

<input type="checkbox"/>	Name	Rank	Margin	Availability	Resource Role	Practice	Default Cost
<input checked="" type="checkbox"/>	Preston Mayo	1	71%	100%	Consultant <input checked="" type="checkbox"/>	Consumer	USD 50.00
<input type="checkbox"/>	Lindsay DiMart	2	74%	100%	Consultant <input checked="" type="checkbox"/>	Consumer	USD 45.00
<input type="checkbox"/>	Doug Douglas	3	71%	0%	Consultant <input checked="" type="checkbox"/>	Consumer	USD 45.00
<input type="checkbox"/>	Roberto Frye	4	74%	0%	Consultant <input checked="" type="checkbox"/>	Financial Services	USD 55.00
<input type="checkbox"/>	Lisa Medley	5	69%	-100%	Consultant <input checked="" type="checkbox"/>	High Tech	USD 45.00

Generate Summary

Resource Details



Preston Mayo
Consultant

∨ Credentials

Region: United States

∧ Details

Region United States

Practice Consumer

CONSTELLATION INSIGHTS

Certinia Launches Veda AI Agent Suite

BY LARRY DIGNAN, CONSTELLATION INSIGHTS

Certinia recently launched Veda, an intelligent operations engine comprising a suite of AI agents and actions that sit on top of its professional services automation (PSA) platform.

[With the launch of Veda](#), Certinia, which specializes in PSA and financial management software, is looking to move from workflow automation to autonomy and create a results engine for professional services. Veda delivers governed and deterministic outcomes as it leverages context from Certinia's professional services (PS), customer success (CS), and financial management (FM) cloud services.

Certinia is built on top of the Salesforce platform.

DJ Paoni, CEO of Certinia, said in an analyst briefing that Veda is designed to address four big realities facing services-based enterprises. Paoni said AI-first is the default enterprise strategy and that customers are looking for more than add-on features. In addition, services are transforming from billable hours to outcome-based economics that require more visibility. Meanwhile, software value is shifting toward results over licenses and innovation cycles are compressed.

“We’ve moved past experimentation. Organizations are no longer looking at AI just as features. They’re looking for an AI-first foundation, and AI has become the primary interface for how work gets done,” said Paoni.

Certinia's Raju Malhotra, chief product and technology officer, said in a briefing that Veda is embedded in Certinia's Salesforce-native stack and combines proprietary context and domain models based on margins, projects, utilization, and CS metrics. Reasoning power comes from a set of large language models (LLMs) that are grounded in Certinia data and agents that can work within Salesforce, Slack, Microsoft Teams, and other applications.

- [Certinia's AI agent strategy kicks off with staffing, customer success](#)
- [Future of Staffing: How Siemens Leverages AI and Certinia](#)
- [Constellation ShortList™ Services-Centric Cloud ERP](#)
- [Constellation ShortList™ Enterprise Cloud Finance](#)
- [Constellation ShortList™ Customer Success Software](#)

Veda has been used with 20 lighthouse customers that have compressed workflows from hours and days to minutes across several workflows. “We are investing in agent-to-agent and multiagent orchestration,” said Malhotra. “We’re also really thinking long and hard about the human/agent collaboration, and trust and governance remain central parts of our thesis, as part of our capabilities.”

Early use cases for Veda include:

- Services estimation for presales with scoping, summarization, and estimates based on structured and unstructured data
- Resource and staffing management with a resourcing agent that drafts staffing plans and uses business policies for planning

Figure 1. The Certinia Work Reallocation Agent handles the complex and time-consuming task of replacing a resource midproject by identifying all assignments, searching for best-match replacements using the same criteria and timeframes, and proposing them to resource managers.

The screenshot displays the Certinia Work Reallocation Agent interface. On the left, a 'Resource Request' (RR-0000155) is shown for the project 'US New Widget Roll Out...'. The current resource is 'John Wagner'. Below this, a table of 'Matched Resources' is visible, filtered by Resource Role and 7 more criteria. The table lists four potential replacements: Jason Strongbow (Rank 1, Match Quality 85.3%, Availability 85%), Bill Mays (Rank 2, Match Quality 82.6%, Availability 82%), and Denny Young (Rank 3, Match Quality 77.3%, Availability 77%).

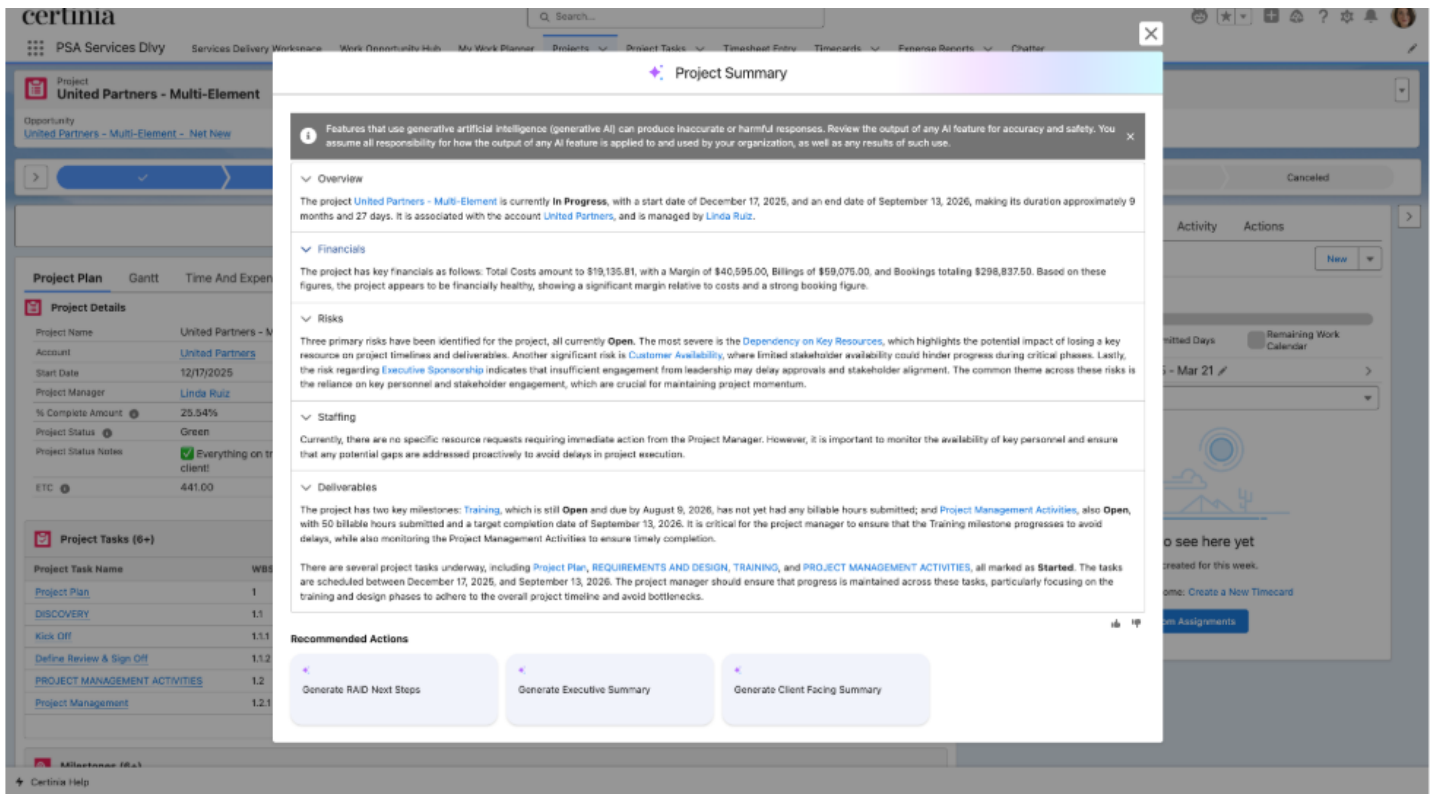
Name	Rank	Match Qu...	Availability	Region	Role	Cost rate
John Wagner	4	0.2%	0%	Unite...	Busin...	USD 50.00
Jason Strongbow	1	85.3%	85%	Australia	Busin...	AUD 55.00
Bill Mays	2	82.6%	82%	United Kin...	Busin...	GBP 55.00
Denny Young	3	77.3%	77%	Unite...	Busin...	USD 55.00

On the right, the 'Certinia Work Reallocation Agent' chat window shows a proposal to replace John Wagner with Jason Strongbow. The agent provides details: Duration (March 2, 2026, to June 15, 2026), Action (Swap Resource), Proposed Resource (Jason Strongbow), Match Quality (85.31%), and Availability (85.33%). It asks, 'Do you want to proceed with the swap?'. Below this, it lists three other resources who match the requirements: Jason Strongbow, Bill Mays, and Denny Young, each with their respective Match Quality and Availability percentages.

Source: Certinia

- Project and delivery management with agents that use transcripts to generate structured risk and issue lists and next-step recommendations
- Utilization with agents to prebuild time sheets and compare scheduled versus actual activities
- CS with autogenerated success plans from Veda
- Business reviews that are autogenerated based on activities, risk, expansion, usage, and project outcomes
- Agent collaboration and work reallocation across channels

Figure 2. Certinia’s Project Summary GenAI feature helps project managers and services leaders who are juggling many projects to quickly absorb full project records. It generates a concise digest of financials, risks, staffing, schedules, and deliverables.



Source: Certinia

Key takeaways on Veda's architecture:

- Veda takes a hybrid approach in which specialist AI agents bring reasoning, judgment, and execution to services operations and collaborate with human experts.
- Veda is purpose-built and domain-specific. Each specialist AI agent is grounded and permissioned for a distinct functional domain.
- Veda includes two integrated layers. One layer uses generative AI (GenAI) to surface insights and synthesize information. The other layer includes specialized AI agents designed to execute tasks and orchestrate workflows.

Certinia said Veda is an add-on for \$30 per user per month for all agentic capabilities. The add-on to existing Certinia licenses includes current Veda agents, more than 64 intelligent actions, and future agents. AI infrastructure usage is tied to Salesforce's Agentforce and Flex Credit plans.

Author Bio

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Larry Dignan was most recently editor-in-chief of Celonis Media, where he sat at the intersection of media and marketing. He is the former editor-in-chief of ZDNet and has covered the technology industry and transformation trends for more than two decades, publishing articles in CNET, Knowledge@Wharton, WallStreetWeek.com, Interactive Week, The New York Times, and Financial Planning magazine.

He is also an adjunct professor at Temple University and on the advisory board for the Institute of Business and Information Technology at the Fox School of Business at Temple University.

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Organizational Highlights

- Named Institute of Industry Analyst Relations (IIAR) New Analyst Firm of the Year in 2011 and #1 Independent Analyst Firm for 2014 and 2015.
- Experienced research team with an average of 25 years of practitioner, management, and industry experience.
- Organizers of the Constellation Connected Enterprise—an innovation summit and best practices knowledge-sharing retreat for business leaders.
- Founders of Constellation Executive Network, a membership organization for digital leaders seeking to learn from market leaders and fast followers.



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