

certinia

Unify Finance, Services, and Success. Make AI Work. ✨

Financial Management (FM) Cloud + Professional Services (PS) Cloud + Customer Success (CS) Cloud + AI

Fix the Foundation. Then Scale AI.

Truly valuable customer experiences require more than just transactional handoffs. Recent SPI reports show client retention is the lowest-scoring area for AI impact, at just **2.98 out of 5**. This isn't a failure of technology—it's a failure of context. When finance, delivery, and success run on separate systems, AI accelerates confusion instead of clarity.

Don't get stuck in this trap. Certinia unifies your entire lifecycle on Salesforce, creating the operational backbone required for predictable performance and AI that delivers measurable results. By connecting FM, PS, and CS in real time, we ensure your data is AI-ready.

Certinia Customer Success (CS) Cloud | Quick Demo



Run as One Business

Connect FM, PS, and CS Cloud natively on Salesforce so performance is visible in real time—not reconstructed after the close.

Services organizations using Certinia solutions achieve metrics like:

10X
Faster financial reporting

111%
Customer retention

98%
Faster invoicing

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The combination of Salesforce and Certinia gives us everything we need for managing our customer relationships, projects, and accounting. This end-to-end solution is just what our business needs to continue its growth path.

Daniel Cox, Group Manager - Technology **PROXIMITY**

One Platform. One Version of the Truth.

- **Make AI Work on Trusted Data**
Run predictive, generative, and agentic AI on a unified foundation of financial, services, and success context.
- **Gain a 360-degree Customer View**
Achieve a single source of customer data to drive growth and ensure every team understands the account's health, history, and financial impact.
- **Protect Margins & Retention**
Align estimates and resource plans early while using data-driven insights to optimize customer outcomes and mitigate churn risks before they escalate.
- **See Risk Early. Act Faster**
Monitor project health and customer sentiment continuously to course-correct before profitability erodes or relationships sour.
- **Eliminate Manual Financial Friction**
Automate billing, revenue recognition, and "swivel-chair" admin work to reduce risk and allow teams to focus on driving real customer value.
- **Maximize Your Salesforce Investment**
Leverage your existing investment in Einstein for AI, Slack for collaboration, and Data Cloud to ensure your teams know everything they should about their accounts.

Over 1,400 companies are already using Certinia solutions.

PHILIPS

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