



VALUE BRIEF

# The Dos and Don'ts of AI for the Growing Services Business

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# Introduction

In 2026, the gap between high-performing service firms and the rest of the market isn't defined by who has access to AI tools. It is defined by who has the operational foundation to make those tools produce outcomes leaders can trust and repeat.

SPI Research's latest findings show that while AI usage in delivery has risen from 18.7% to 23.1%, leadership confidence is dipping. This reflects a hard truth: integrating AI into delivery and financial workflows is a fundamental operational change, not a simple tool rollout.

## The Performance Divide

The impact of this transition is clear in the bottom line.

24.6% EBITDA

High Performers

12.3% EBITDA

All Others

The tension lies in readiness. When delivery and finance systems—and the teams that run them—don't share consistent definitions and clean datasets, AI doesn't create clarity. It scales inconsistency.

## Data quality drives success

The number one barrier to AI success is **Data Quality**. When delivery and finance systems are “stitched together,” AI doesn't create clarity—it scales inconsistency. This friction leads to data lag and manual reconciliation, directly hurting your forecasting and margin visibility.

Standardization is the bedrock of predictable growth. You cannot drive a modern business on inefficient processes. To help you bridge the data gap with financial rigor, here are **10 essential Dos and Don'ts for scaling your services business**.

# The Dos for Predictable Scale

The “Dos” reflect what consistently sets high-performing service firms apart, including clean data, aligned workflows, and financial discipline.



## **DO** prioritize data standardization

Invest in process clarity and system hygiene as the primary lever to lift AI performance. If the data is inconsistent or incomplete, the AI outputs will be inconsistent as well. Standardization here means tightening definitions, normalizing workflows, and reducing manual reconciliation so reporting reflects the same reality across teams.



## **DO** unify your front and back office

Connect sales, delivery, and finance so every dollar can be captured, billed, and reported accurately. When systems remain disconnected, teams create their own versions of project truth. That increases exceptions, slows billing cycles, and reduces forecasting reliability.



## **DO** focus on internal fundamentals first

Follow high performers by prioritizing internal productivity and operational lift before pushing immature AI services to clients. The firms pulling ahead are treating AI as an internal performance system first, where operating discipline and repeatability determine whether the investment compounds.



## **DO** use AI where delivery work is already becoming the proving ground

SPI shows the strongest improvement signals in service execution. Organizations report that AI is enhancing service delivery capability, and clients increasingly expect their partners to use AI in service delivery. The highest gains are tied to standardized, document-heavy tasks like creating deliverables and reviewing master services agreements. That is a practical indicator of what to standardize first: work that can be templated, accelerated, and quality-checked.



### **DO invest in workforce training**

Proficiency is a clear divider. SPI reports that overall employee proficiency with AI tools remains below 50%, while high-performing firms have significantly higher proficiency. Training determines whether teams apply tools consistently within delivery workflows or revert to ad hoc use that never becomes repeatable.



### **DO streamline speed to cash**

Standardization should show up in the financial cycle: fewer billing disputes, fewer corrections, tighter traceability between delivered work and invoicing, and clearer reporting. If teams still “fix the numbers” at month-end, the operating model is not ready for dependable automation.



### **DO align leadership early**

Ensure your executive team supports the integration of AI and is willing to sponsor the required operational work. Leadership support is necessary, but it does not replace governance, workflow alignment, and clear measurement. Firms that win here treat adoption as a managed operating shift, not a departmental experiment.



### **DO start with platform-embedded capabilities where appropriate**

For finance and operations in particular, a practical on-ramp is to leverage embedded capabilities within existing platforms to quickly surface data-quality issues, build confidence, and tighten governance before expanding into more sensitive workflows.



### **DO benchmark against high performers**

Aim for high-performing operating patterns, not surface-level tooling. SPI reports a clear performance divide, with high performers at 24.6% EBITDA versus 12.3% for the rest. The takeaway is not to copy a tech stack. It is to copy the discipline: cleaner data, clearer processes, stronger alignment, and a more structured path to adoption.



### **DO be realistic about the timeline**

Plan around the updated ROI reality. If leaders now expect longer timelines to reach positive ROI, the correct response is to prioritize foundational wins that compound: standardization, unification, adoption habits, and governance.

# The Don'ts that Stall Growth

The “Don'ts” highlight patterns that slow delivery, erode trust in reporting, and extend ROI timelines, especially when systems and teams are misaligned.



## **DON'T automate inefficiency**

Never expect AI to fix weak foundations. If workflows are inconsistent and data is fragmented, automation accelerates inconsistency.



## **DON'T rely on stitched-together systems**

Avoid clunky, manual integrations that create data lag and conflicting context. When teams cannot agree on the facts, forecasting becomes a debate, billing is delayed, and operational reporting is revised.



## **DON'T ignore data quality**

Data quality remains the top barrier to trust and reliability. If this is not addressed first, you will spend more time validating outputs than acting on them.



## **DON'T over-invest in hype use cases**

Avoid complex, immature use cases early. Early wins tend to concentrate where work is repeatable, and data requirements are lower. As you build a stronger foundation, you can earn the right to expand.



## **DON'T neglect financial rigor**

Do not scale without governance and financial discipline. Several finance and operations activities still show weaker AI improvement signals, partly because these functions depend on accurate, trusted data and clear accountability.



## **DON'T fall for the rapid ROI myth**

Be realistic about timelines. Expectations have shifted meaningfully, which should change how you plan for investment, adoption, and measurement.



### **DON'T use AI as a black box**

Avoid a lack of transparency and accountability. If teams cannot explain how an output was produced or validated, trust breaks quickly, especially in finance and delivery decisions.



### **DON'T assume selling AI services means you are ahead**

SPI reports that the share of firms selling AI services remained essentially flat year over year, indicating that external commercialization is not keeping pace with internal experimentation. For many firms, the internal operating model needs to mature first.



### **DON'T let utilization slide while you experiment**

Do not treat AI as a side initiative disconnected from resource discipline. If utilization and margin visibility weaken while experimentation grows, the firm is not scaling. It is drifting.



### **DON'T wait to modernize**

Client expectations are rising. Firms that build dependable foundations can consistently meet those expectations, not through heroics.

# The Bottom Line.

Standardization is the bedrock of AI success. Certinia is the only platform that unifies the entire services journey, from sales to delivery to financial close, all on Salesforce. We give growing companies the financial control and operational clarity to deliver value with certainty.

## The Certinia Advantage: **PSA + FM**



### **Professional Services Automation (PSA):**

Master the services lifecycle by optimizing resource utilization, improving project predictability, and streamlining delivery with real-time visibility.



### **Financial Management (FM):**

Gain absolute financial control with automated revenue recognition, flexible billing (subscription, usage, or hybrid), and real-time analytics to eliminate revenue leakage.



### **Salesforce-Native Synergy:**

Because PSA and FM share the same platform, every billable hour and project milestone flows instantly into your financials, giving your AI agents the clean, real-time context they need to produce outcomes you can trust.

## Ready to build your foundation for AI success?

Contact Certinia today to see how a unified platform can transform your service delivery.

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