



Connect the entire services delivery lifecycle on a single platform

Certinia is the only software platform that connects and manages the entire service journey —from the initial sale through project execution to renewal—all on Salesforce.

From services estimation and project delivery to advanced resource management and customer success, Certinia helps you plan, staff, and deliver projects with confidence — with an emphasis on customer collaboration at every stage.

The smarter, more connected way to run a services business

No more guesswork. No more broken integrations. No more missing targets. **Certinia's cloud** solutions are explicitly designed to meet a services teams' complete needs and drive better customer outcomes.

Professional Services Cloud

Optimize resources, automate estimates, and bring predictability to every aspect of delivery.

Financial Management Cloud

Simplify and streamline your services financials from invoicing and billing to bookings and backlog.

Customer Success Cloud

Improve customer retention and renewal rates with customer success playbooks and actionable insights.

The pain points we solve:

- Siloed Teams
- Manual Processes
- Disconnected Data
- Misaligned Workflow
- Multiple Integrations
- Lack of real-time service visibility

The metrics we improve:

- Estimate accuracy
- Resource utilization
- Revenue capture
- Forecast accuracy
- Delivery quality
- Customer retention

Need proof? Organizations running Certinia achieve:

>90%
Less revenue leakage

>99%
Data accuracy month-over-month

85%
Utilization Rate





The richness and transparency of data that Certinia PS Cloud provides is critical for our ability to scale our growing global workforce.

Ryan Brown, Senior Director of Operations,
Global Professional Services



With Certinia PS Cloud you will gain:

- **A unified platform for services success:** Manage the full lifecycle—from opportunity to renewal—on a single, connected platform. No data silos. No costly integrations. Just one trusted source for real-time insights to drive better decisions.
- **Intelligent resource & skills management:** Maximize resource utilization while improving employee experience and retention. Advanced AI-powered staffing ensures the right people are on the right projects—at the right time.
- **Best-in-class estimating & analytics:** Turn data into decisions with advanced forecasting, utilization insights, and realtime financial visibility—built natively on the leading cloud platform.
- **Salesforce-native for a 360° view of your business:** No more constant syncing and clunky integrations. Your CRM, project data, and financials work together seamlessly. Get a complete, real-time view of your services business without the risk, delays, or inefficiencies of disconnected systems.
- **AI-Powered Services Delivery:** Make your business more predictable and teams more productive with Certinia's Predictive, Generative, and Agentic AI. Achieve unmatched visibility and insight to optimize planning and drive higher margins, quicker delivery, and better customer satisfaction.

Over 1,400 companies are already using Certinia solutions.

PHILIPS

splunk>



SIEMENS

docusign

**Hewlett Packard
Enterprise**

How do I connect to Certinia?

Please reach out to your Certinia sales representative or contact us here to learn more about Certinia solutions and generate your personalized offer.