



TRANSFORMATION PLAYBOOK

The path to intelligent services operations

Connect teams, data, and workflows.
Move AI from insights to execution.

certinia

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Digital transformation didn't fail. **It stopped short.**

Think about your own experience.

Over the past few years, has your company invested significant resources in transformation? New systems, fresh dashboards, more data than ever. Most high-tech companies have. And yet the day-to-day reality hasn't changed all that much.

Sales still passes incomplete context to delivery. Project teams still chase updates across tools. Finance still waits for clean data before it can understand margin, revenue, or risk. Leaders have more information than ever, but not always the clarity to act faster.

That is the real problem. Transformation created visibility, but it did not always create continuity.

The next phase is not about adding more tools or creating another dashboard. It is about building a more connected way to run services operations, where teams, data, workflows, and decisions move together.

That is the path to **intelligent services operations**.

Why high-tech operating models are **breaking**

High-tech services organizations are under a different kind of pressure now. Growth is no longer only about winning new deals. It depends on how quickly the business can turn those deals into delivered value, recognized revenue, and long-term customer relationships.

That is harder to do when teams are still working across disconnected processes.

- Sales may close the deal, but delivery needs the right context to start well.
- Finance needs accurate project and billing data to forecast with confidence.
- Customer success needs visibility into what was promised, what was delivered, and where risk may be building.

AI expectations have changed, too. Leaders are moving beyond speculative pilots and asking for practical use cases that reduce manual work, accelerate execution, protect margins, and improve customer outcomes.

At the same time, services models are shifting from hours and outputs toward value, usage, and outcomes. That shift requires more than modern software. It requires an operating model in which teams, data, and decisions remain connected from opportunity to renewal.

Firms that cannot operationalize this shift will fall behind, even if they invest heavily in AI.

The **hidden cost** of fragmented operations

Your tools may work well on their own. The problem begins when they do not work together.

In many high-tech services organizations, sales, delivery, finance, and customer success each have their own systems, reports, and workflows. That may seem manageable at first, but over time, the gaps between those systems create real operational costs.

Project managers spend hours updating status reports, RAID logs, and spreadsheets. Finance teams wait for clean project data before they can understand margin, revenue, or risk. Customer success teams may not see delivery issues until they start affecting renewal conversations.

These gaps show up in four ways:



The manual tax:

Teams lose time to manual reporting, reconciliation, and coordination. Work that should move forward gets stuck in updates, checks, and follow-ups.



The maintenance spiral:

Teams spend too much effort keeping integrations and workarounds alive. Instead of improving operations, they keep fixing what already exists.



The context gap:

Sales, delivery, finance, and success do not always see the same picture. Each team makes decisions with only part of the customer story.

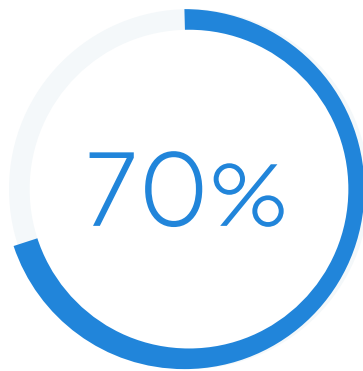


The trust deficit:

Leaders cannot act quickly when data needs to be checked and rebuilt. By the time the numbers feel reliable, the opportunity may have moved on.

That is why many transformation efforts make work easier at the edges, but still leave the business fragmented at the core.

Connected systems **are not** the same as unified operations



of digital transformations fail to achieve their intended outcomes.

Source: McKinsey & Company

So why does this happen so often?

Because connecting systems is not the same as unifying them. An API can move data between tools, but it does not create shared context across the business.

Data becomes available, but it rarely becomes actionable. A dashboard may indicate that a project is behind schedule, but it cannot help teams decide what to do next.

And then there is AI. Most AI tools are layered on top of fragmented systems. They may be able to read a ticket or summarize text, but they do not have the full customer, delivery, and financial context needed to support real decisions.

You cannot bolt AI onto fragmented operations and expect better outcomes.

From system integration to **services orchestration**

So, what is the alternative to fragmented transformation?

A fundamental shift in approach. Instead of spending more energy connecting tools and improving reports, leading organizations are moving toward a new services orchestration model.

Here is the difference.

Old way	New way
Connect tools	Unify the cycle
Improve reporting	Orchestrate workflows
Automate tasks	Enable AI to act with context

The old way treats each function as a separate island. You connect them with pipes and hope the business moves smoothly across them. The new way treats the entire services lifecycle as one connected system, from the first conversation with a prospect through delivery, billing, and renewal.

That is where Certinia comes in.

Certinia is the leading global provider of AI-powered Professional Services Automation (PSA), unifying sales, delivery, finance, and customer success on a single record to act with certainty across the entire services journey.

In practice, that means one system, one shared understanding of every customer engagement, and a foundation where AI has the context it needs to act, not just advise.

The intelligent services operations engine

One platform. One lifecycle. One shared way of working.

Most organizations run services operations across connected tools. That creates visibility, but not continuity. Teams still interpret data, align manually, and decide what comes next.

Certinia takes a different approach.

It brings sales, delivery, finance, and customer success onto a single operational platform, where the entire lifecycle, from opportunity to renewal, runs with shared context.

That changes how work happens. Instead of passing information between tools or rebuilding context at every stage, teams operate in the same environment, turning your system of record into a platform of action.

This is also what makes AI meaningful.

Veda, Certinia's AI engine for services operations, is built into this platform. It works with the full context of customer engagements, financial data, and delivery activity, so AI can support real decisions without losing control or trust.

A source of truth tells you what happened, and a platform of action helps you do something about it.

Where AI moves from insight to **execution**

Now that the operating foundation is in place, the next question is simple: what makes AI useful inside it?

For high-tech services teams, useful AI cannot stop at summaries or prompts. It needs to understand the work, the context, and the financial realities behind every customer engagement.

That is where Veda comes in.

Because Veda operates natively within the Certinia platform, it works with the same operational record that drives revenue, margins, delivery progress, and customer outcomes.

That gives Veda three important advantages:



Built into services operations:

It works where teams already manage the lifecycle, not outside it.



Grounded in shared context:

It understands customer, delivery, financial, and operational data together.



Designed for action:

It supports decisions across staffing, risk, communication, and execution.

That is what moves AI from insight to execution.

AI that knows **when to calculate** and **when to generate**

Not every AI task is the same. Some outputs need precision, governance, and auditability. Others benefit from speed, personalization, and natural language.

Veda separates these jobs clearly.

For financial governance, Veda uses rules-bound, deterministic logic. That means services math is governed, not guessed. This applies to revenue recognition, work-in-progress calculations, margin analysis, and resource decisions.

For communication and insight, Veda uses generative AI grounded in decades of professional services-based institutional memory. That gives teams speed and relevance without treating every output as open-ended generation. This applies to client communication, project summaries, RAID extraction, and success plan creation.

You can think of it this way:

- Deterministic AI calculates
- Generative AI communicates

Veda applies precision where it's critical and speed where it drives value.

What changes when operations **move as one**

Once services operations run on a unified platform, the difference shows up across the lifecycle.



Seamless lifecycle flow.

Sales passes a ready-to-deliver project to delivery without broken handoffs. Finance sees accruals in real time, not after the month closes.



Continuous customer context.

Customer Success sees delivery issues before the renewal review. Teams can address risk early instead of being surprised later.



Proactive operational execution.

Alerts drive cross-functional action, not just dashboard notifications. Teams can intercept and isolate risks before they ever impact delivery or margin.



Faster value realization.

Projects start faster, billing moves on time, and revenue recognition becomes more predictable. Teams spend less time waiting for data and more time delivering results.



Shift from data to outcomes.

Project managers spend less time on reconciliation, status reporting, and data chasing. They focus more on client value, relationships, and outcomes.

20+ hrs
per month

Project managers can reclaim up to [20 hours per month](#) by reducing administrative tasks such as manual reconciliation, status reporting, and data chasing.

Here are a few specific examples of tasks that drive this time savings.



Project summarization:

Condenses project updates, financials, and staffing notes into a concise digest.



RAID management:

Extracts risks, issues, actions, decisions, and dependencies so teams can act faster.



Client communication:

Drafts proactive client updates while omitting sensitive internal details such as margins.

One system across the services lifecycle

When operations run on a unified platform, every stage of the lifecycle connects and builds on shared context.

Veda supports each stage of this lifecycle, working within the same operational context that drives delivery, financials, and customer outcomes.

How Veda supports each stage:

- Opportunity:**

It summarizes past project risks before you commit. That helps your sales team set realistic expectations and avoid repeating past mistakes.
- Estimation:**

It recommends roles based on historical margins from similar projects. Instead of guessing, you get data-backed suggestions for skills and hours.
- Staffing:**

It identifies best-match resources by skills, region, and role. No more manual searches across spreadsheets. The platform finds the right people quickly.
- Delivery:**

It generates weekly status reports and flags risks automatically. Your project managers do not have to compile updates from multiple sources.
- Billing:**

It detects missing time entries before the billing cycle closes. That means fewer corrections, fewer write-offs, and faster invoice generation.
- Renewal:**

It surfaces satisfaction signals from delivery notes and support data. Your customer success team knows where to focus before the contract comes up.

Veda provides deterministic foresight across the services lifecycle, surfacing risks, bottlenecks, and margin pressure before they impact outcomes.

Why AI needs the **right** operating foundation

You cannot build a smart house on a cracked foundation. The same is true for AI. Without a connected operational base, even advanced AI struggles to deliver trusted results.

Certinia's platform gives Veda that foundation through three layers:

Native architecture.

Veda operates inside Certinia on Salesforce, so it works with lifecycle context from the first bid to the final invoice. There is no need to pull meaning from disconnected tools.

Modern architecture.

Workflow automation handles repeatable, rules-based tasks, while agentic capabilities support more dynamic operational decisions. Veda helps teams move faster without losing control.

Deterministic scaffolding.

Financial outputs are governed by rules-bound logic, so services math such as revenue recognition, margin calculations, and resource decisions remain trusted and auditable.

AI is only as effective as the platform it operates within. Together, these layers help Veda understand when to calculate with precision and when to generate with speed.

Ready to move toward intelligent services operations?

You have seen the costs of fragmentation. You have seen what unified operations make possible. The next step is to assess where your organization stands today.

Start by asking five honest questions:

- 01** Where does customer context break across your lifecycle? At which handoff does important information get lost or delayed?
- 02** How much time do teams lose to the manual tax each week? Add up the hours spent on spreadsheets, status reports, and data reconciliation.
- 03** What percentage of your IT budget is trapped in the maintenance spiral? How much goes to keeping brittle integrations alive instead of building new capabilities?
- 04** Where do leaders still lack trusted, real-time visibility into margin, utilization, or risk?
- 05** What would AI need to act with full context in your operations? Imagine an AI that does not have to guess. What would it need to see, know, and be able to do?

These questions are not meant to be easy. They are meant to surface the real gaps, the ones that fragmented transformation has left untouched.

Evaluate your services operations readiness today!

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

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