

Deliver services with intelligence

Run a more predictable and efficient business, tackle your most pressing challenges with confidence, and exceed customer expectations — using the embedded analytics in FinancialForce Professional Services Automation (PSA), powered by Salesforce CRM Analytics.



Intelligent, predictive & actionable insight for your services business

Your business has captured more structured and unstructured data about your customer and financial trends than any human, spreadsheet, or traditional analytics tool can process. Turn that valuable data into actionable insights and make critical decisions based on specific scenarios and patterns of behavior—Use pre-built dashboards and fine-tuned data to keep your operations running lean, consistent, and predictive, all centered around your customer needs.

Milestone management

Surface and manage KPIs to help fuel your business growth and better manage the health of your business. Use a scenario-based approach to ensure critical milestones and the impact on business is always tracked, applying the right delivery curves and weighting system for true outcomes.

Smart capacity planning

Better understand all aspects of a resource schedule — project time, PTO, non-billable time, backlog — to better predict needs and optimize staffing, based on roles or skills. Automate once manual processes and make it easier to increase both your utilization and billing rates.

Backlog visibility

Build staffing models geared to drive higher margins, quicker delivery, and customer satisfaction. Personalize dashboards to suit your needs with multiple perspectives by customer, region, practices, and groups, with visibility ranging from a single project to your entire portfolio.

Predictive project management

Leverage the predictive capabilities of the CRM Analytics platform to monitor and anticipate project performance. The Project Burnup view can be embedded at the individual project page, or into one of many role-based workspaces to help limit project overruns and warn that contracts may be exceeded, well before project completion.

