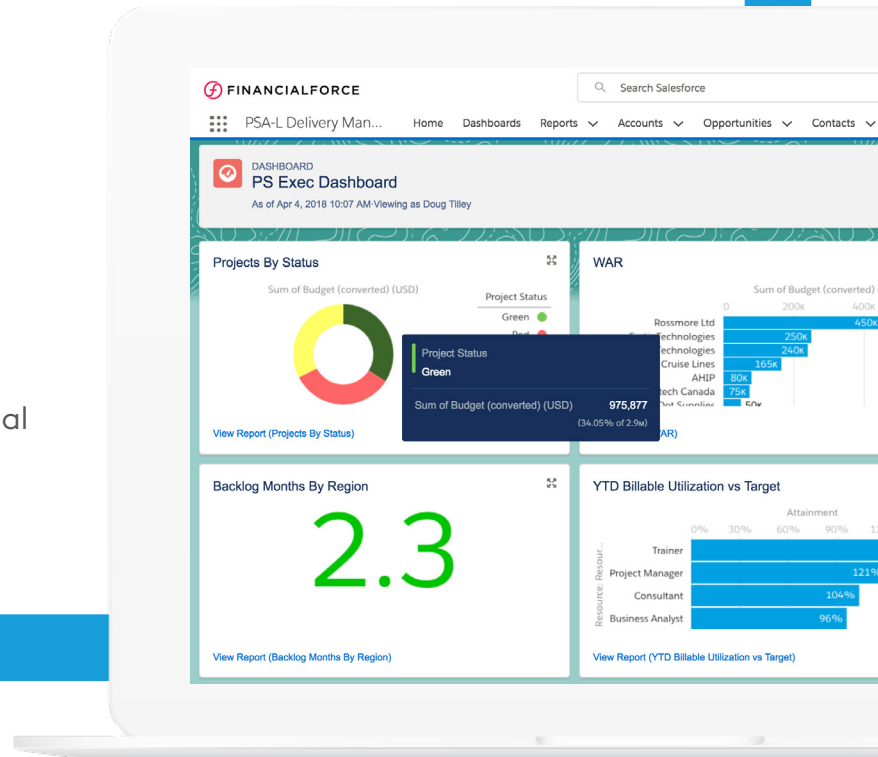FINANCIAL FORCE

# Delight customers and grow revenue

Keep projects on time and profitable, customers happy, and reports up to date with the market-leading professional services automation (PSA) solution on the Salesforce platform.
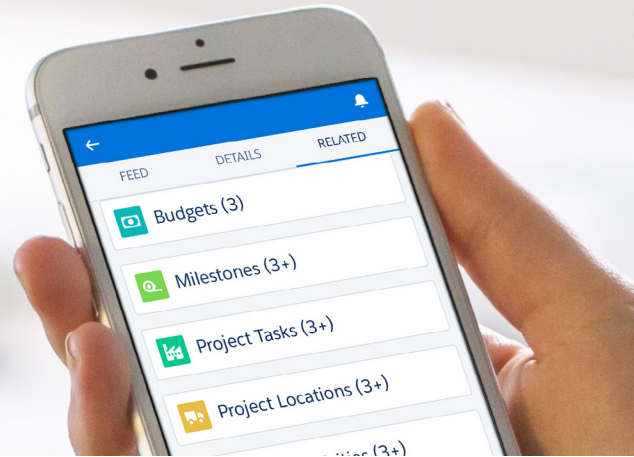
## The top choice in PSA solutions

FinancialForce Professional Services Automation (PSA), ranked #1 on G2 Crowd, gives business leaders and teams unprecedented visibility into sales, delivery, and finance. With everything on Salesforce, you get the insights you need to manage projects and resources while tapping into powerful business forecasting. Empower your teams, improve customer satisfaction, and grow profits with FinancialForce PSA.

## Perfect sales-delivery handoff

With Salesforce CRM and FinancialForce PSA on the same platform, opportunities instantly translate into service engagements. Empower sales teams with real-time insights about project statuses, resource availability, and more. Connect sales and delivery, and everybody wins.

## Right resource, right time

Give resource managers the visibility they need by identifying the resource demand during the sale. Easily schedule the right people onto the right projects at the right time, and resolve staffing conflicts before they become problems.

## Billing & revenue recognition

Automate and streamline processes across every aspect of your business from sales and delivery to billing and revenue management. Track everything, including billing and expenses in multiple currencies, and automate compliance with new revenue recognition rules.

## One team, one tool

Companies with greater project visibility achieve higher win rates, utilization, and margins. With sales, delivery, and finance teams all using the same tool, you'll get better visibility into pipeline, resource demand, and other critical project data.

## Reporting & analytics

Real-time dashboards and reports give you all the data you need, including actuals, expenses, assignments, milestones, resource requests, backlog, and more. Get complete visibility into the information you need to efficiently deliver on projects and accurately forecast future business.

## INCREASED UTILIZATION

Using FinancialForce PSA with Salesforce helps delivery teams streamline processes across the board. Third-party analyst firms, including Service Performance Insight, have found that organizations with integrated PSA and CRM systems see boosted metrics, including:

• Increase in year-over-year revenue growth
• Reduced sales cycle (qualified lead to contract signing)
• Increased pipeline and revenue per project

## ANALYTICS & PREDICTABILITY

Powered by Salesforce Einstein, FinancialForce Services Analytics provide deep visibility and insights into billings, backlog, capacity, and utilization. Combining these analytics with the broadest set of delivery data available in the market gives your business a clear view into future growth.

• Get a deeper understanding of overall business health
• Increase predictability with clearer views into forecast, backlog, and utilization
• Surface and manage KPIs to fuel business growth

## SERVICES COMMUNITY

Optimize your customer and partner interactions with FinancialForce Services Community. As your project management hub, Services Community lets you share project-related information and status updates, get time and expenses entered straight into the system, and keep track of critical financial data.

• Connect to Salesforce Chatter for real-time updates
• Collaborate from any device on shared documents
• Customize for a completely branded experience

## SOCIAL COLLABORATION

Native to the Salesforce platform, FinancialForce PSA includes support for Chatter collaboration tools right out of the box, allowing delivery teams to share insights, attach documents, or note anything related to a project.

• Bring Facebook-like collaboration functionality to project delivery
• Create project groups and discussion
• Empower teams to use mobile devices

## SALESFORCE PLATFORM

Natively built on the Salesforce platform, FinancialForce PSA gives you the scalability and flexibility of the world's #1 cloud platform. So instead of maintaining your IT stack, you can focus on serving customers and growing the business.

• Enjoy a sleek, easy-to-use, and secure user experience
• Tap into AppExchange, the world's leading business app marketplace
• Leverage the future of reporting and analytics with Salesforce Einstein

## RESOURCE MANAGEMENT

Bring people and project data together with FinancialForce and ADP (or your existing HR system) so you can manage all your worker data in one place.

• Increase margins and revenue through a unified view of your people, skills, and projects
• Update calendars and timecards automatically
• Bridge the payroll register to your general ledger

## TIME & EXPENSES

Highly configurable and easy to use, FinancialForce PSA makes it easy for teams to complete administrative tasks and submit time and expenses.

• Time entry available via Salesforce1 app
• Get mobile time and expense entry for iPhone/Android
• Set up flexible approvals and routing