



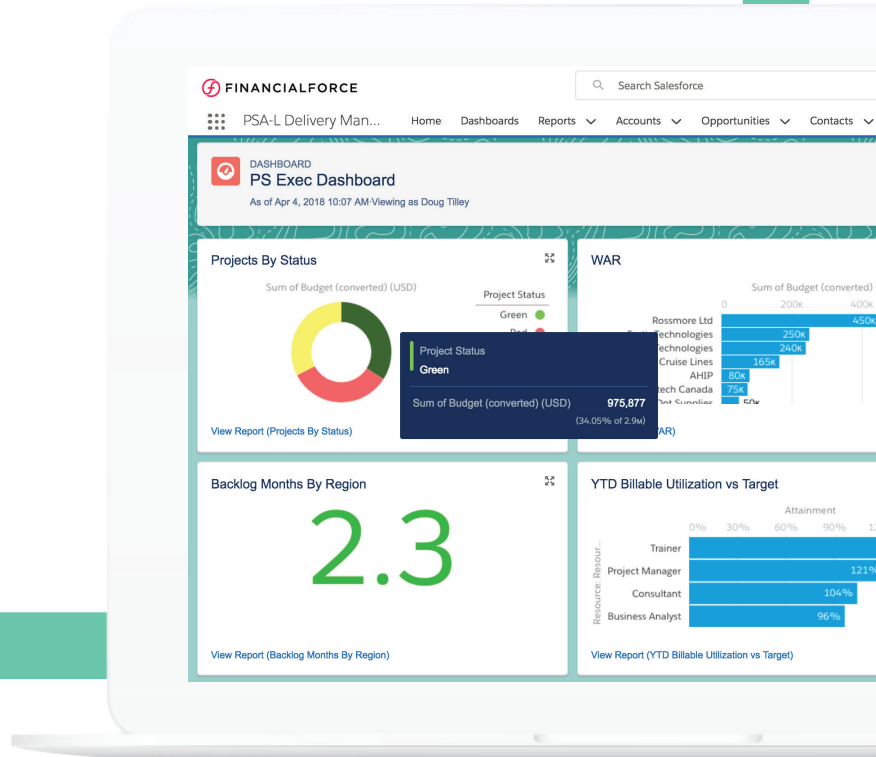
# Professional Services Automation

Manage professional services teams, projects, partners, and financials with the leading PSA solution built on the Salesforce Platform.

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# Delight customers and grow revenue

Manage professional services teams, projects, partners, and financials with the leading PSA solution built on the Salesforce Platform.



## The #1 PSA solution on the Salesforce Platform

FinancialForce Professional Services Automation (PSA), ranked #1 on G2 Crowd, gives professional services leaders and teams unprecedented visibility into sales, services delivery, and finances. With everything on the Salesforce Platform, 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.

**“We couldn’t live without FinancialForce PSA. It’s ingrained in what we do.”**

Mark Conklin, Director of Operations, Salesforce



## Perfect sales-services 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 services, 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.

## One team, one tool

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

## Billing & revenue recognition

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

## Powerful forecasting

Optimize resource planning and project profitability with hyper-accurate forecasting and insight capabilities built-in. Get unmatched visibility into every dollar recognized and planned. Build staffing models geared to drive higher margins, quicker delivery, and customer satisfaction.

## 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.

**+143%**

Average year-over-year professional services revenue

**-23%**

Average discount on contracts

**+39%**

Average win ratio

**INCREASED UTILIZATION**

Using FinancialForce PSA with Salesforce helps services 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 professional services revenue growth
- Reduced sales cycle (qualified lead to contract signing)
- Increased pipeline and revenue per project

**ANALYTICS & PREDICTABILITY**

Powered by Salesforce Einstein, FinancialForce PSA analytics provide deep visibility and insights into billings, backlog, capacity, and utilization. Combining these analytics with the broadest set of services 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 help fuel business growth

**PSA COMMUNITIES**

Optimize your customer and partner interactions with PSA Communities. As your project management hub, PSA Communities 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 services 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

**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

**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

**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

# Want to see the #1 PSA in action?

LEARN MORE

Agilyx builds better organisations by empowering people at work to be their best. Agilyx has more than two decades of experience delivering ERP, PSA, HCM, Payroll, Talent and Learning platforms across Professional Services Organisations, Government, Education and Not for Profit Organisations globally.

We deliver digital transformations to our customers leveraging the world's best new services-economy solution - FinancialForce, all built natively on the Salesforce platform, bringing together our deep knowledge of ERP and PSA to create a full 360-degree view customer businesses using a single platform. In partnership with FinancialForce, Agilyx's clients include TSA Management, the Australian Associated Press (AAP), WT Partnership and the Australian Olympic Committee, to name a few.

Visit us at [www.agilyxgroup.com](http://www.agilyxgroup.com)

