FINANCIA FORCE

The only customer-centric ERP

on the Salesforce Platform



FinancialForce is the only customer-centric cloud ERP for the new services economy.

FinancialForce unifies data in real-time, enabling companies to rapidly evolve their business models.

Historically, ERP vendors have focused on solving for transactional, linear processes.

So what does this mean for ERP and other business apps?

A subscriptionbased world

From Uber and Spotify to Apple and Salesforce, the belief that we need to own everything from cars to music to software has been completely upended. In this new services economy, businesses and consumers alike want the latest and greatest for the best possible value, and **we only want to pay for what we actually use.**

If you're not in multiple business models, you're not ready for what's about to shift. And, by the end of 2020, your business will have at least 3-4 different types of business models. Now the real question is: "Can your cloud system handle that?" If it can't, you're in trouble.

R "Ray" WangPrincipal Analyst, Founder,
Chairman Constellation Research



Today's customers in the worlds of B2C and B2B now expect everything as a service.

Transactional ERP

Historically, ERP vendors have focused on solving for transactional, linear processes. The customer places an order, then the ERP system creates a bill and initiates cash collection. In cases where a client had more complex needs, ERP vendors would mold their solution like a lump of clay to fit new processes, creating increasingly intricate and overly specialized solutions that only served that particular client for that particular point in time, but failed to be responsive to any future needs.

The businesses that thrive will be those that can swiftly identify new opportunities and preempt changing expectations.

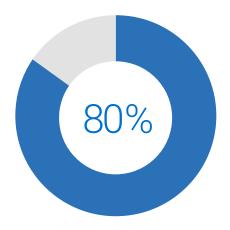
Customer-centric ERP

The "lump of clay" model is no longer sustainable. In the new services economy, the pace of change is relentless, exposing weaknesses in static business models and driving every organization to continuously blend revenue streams from products, subscriptions, and a wide variety of services. The businesses that thrive today will be those that can swiftly identify new opportunities and preempt changing expectations, and doing so will require a nimble ERP system that empowers your business to be adaptive to customer needs.



So what are the requirements for ERP in the new services economy?

While many businesses have already taken the important first step from legacy, on-premise to cloud-first systems, a critical obstacle remains: most cloud ERP systems are still designed for the linear, transactional order-to-cash process. Using such systems will unfortunately turn the back office into an anchor, slowing innovations and new models developed by the rest of the business. Organizations that want to be able to act rapidly and intelligently best serve customers in the new services economy must instead choose an ERP solution built around the following key themes.



The vast majority (80%) of companies have noticed a change in how their customers want to access and pay for goods and services, and 50% of those same companies are changing their pricing models as a result, according to The Economist.¹

Business model agility

Every business, from century-old Fortune 500 corporations to newly founded startups, must now be able to develop and leverage flexible, ever-evolving business models that can adapt to changes in technology, the competitive landscape, and customer expectations.

Running your business in entirely new ways requires an ERP system that allows you to view multiple revenue streams, easily add new business models, and transition to emerging regulations (e.g. ASC 606, IFRS 15) without disrupting core business processes. With each of these components in place, the ideal ERP solution will not just let you redefine your business but will also give you real-time access to core metrics around forecasting, profitability, and customer success.

^{1.} https://www.forbes.com/sites/kimberlywhitler/2016/01/17/a- new-business-trend-shifting-from-a-service-model-to-a-subscription-based-model/#f472cbb4a5fe



In the new services economy, every business must be able to act with the finesse and wisdom of a leading consulting firm by adopting a cloud ERP solution designed for time and talent optimization.

Time & talent optimization

Large consulting firms have long understood how critical it is to efficiently use their resources—not just financial resources, but time and talent resources too. In the new services economy, every business must be able to act with the finesse and wisdom of a leading consulting firm by adopting a cloud ERP solution designed for time and talent optimization.

Such a solution must allow your business to balance supply and demand for all resources at the global level while also enabling individual teams to assign people with specific skills to specific projects. Additionally, these same systems should be intrinsically tied to finances so that your business can predict profitability of customers as well as which resources will be needed in the future. And, perhaps most importantly, instead of making people contort their workflows around an inflexible tool, the ideal ERP solution should be able to adapt itself to your people and existing processes.



Those businesses best positioned to thrive in the new services economy will be those that can tap into this large store of data to derive future best practices and predictive intelligence.

Predictive insights

Ultimately, the ideal ERP solution should offer you a complete view of your business within the context of your customers' journey. Central to the back office, ERP systems house most of the signifi-cant data about your customers, from transactions to people hours to process details. Those businesses best positioned to thrive in the new services economy will be those that can tap into this large store of data to derive future best practices and predictive intelligence.

An ERP solution designed for the new services economy must grant you deep understanding of your utilization metrics. Beyond that, the ideal solution should also give you the power to predict future customer patterns and behaviors so at any given time you can act in the best way for your business. In the new services economy, every organization will have countless paths to choose from, but focus will remain as important as ever. Optimizing your business outcomes based on leading indicators vs. lagging indicators will allow you to guide your business in the right direction.

Transform your entire journey with the only customercentric ERP

A glance at the new customer journey



Put data to work

Customer-centric processes allow you to reduce cost while growing profit



Take the burden out of customer intelligence

Manage all your customer data in one place



Make information accessible

Operations that run at optimal speed get the job done fast and right

Business data transformed into **business insight**



Get BI at your fingertips

Use social/mobile technology to power your business and communicate anytime, anywhere



Transform big data into your next big ideas

Proven cloud platform makes it easy to buy, deploy, learn, and extend within your infrastructure and business cycle

Professional Services Automation (PSA)

Manage your professional services team, customers, projects and financials all in one integrated app. You will gain visibility into the sales pipeline and resource demand before it's needed. Easily manage projects to grow revenue, improve margins and deliver on customer promises.

- Resource Management
- · Talent Management
- Sales Engagement
- Mobility & Collaboration
- Professional Services Communities
- Project Management
- Time & Expense Management
- Project Financials Billing & Revenue Recognition
- Reporting & Dashboards

By understanding where projects are up to in real time, we can manage our project profitability unlike any other architecture firm.



Gareth StewartBusiness Development Manager, Ridley

Financial Management

Streamline your opportunity to cash process, manage revenue precisely, and generate real time financial analysis and compliance report with FinancialForce Financial Management on Salesforce. Know exactly what's going on with customers at any given time and act on it.

- Finance & Accounting
- Inventory Management
- Billing
- Revenue Recognition & Forecasting
- Spend Management

How we hire, how we plan, how we know who has paid—and who has not. It is the system that runs our business and where all our decisions are made.



Mark Stibbe Managing Partner, Global Operations, GroupBy

Billing Central

Embrace new business models with confidence. With FinancialForce Billing Central you can manage the most complex customer relationship all in one closed loop process.

- Subscription & Usage Billing
- Opp to Renewal Visibility
- Integral Revenue Recognition
- End-to-End Audit Trails

Because of FinancialForce, we have saved time and money and can now focus on customer service rather than on collections.



Paul Steele SVP, Seagate

Revenue Recognition & Forecasting

Prepare for the new ASC 606 and IFRS 15 standards and centralize revenue streams in a single revenue recognition solution. Put an end to error-prone spreadsheets, automate calculations, reduce your period-end close, and gain a complete picture of your organization's revenue.

- Recognized & Deferred Revenue
- Contracts & Performance Obligations
- Revenue Allocation & Calculation
- Rules & Templates
- Linked Source Data

FinancialForce has been a game changer for us. Access to data we never had before allows us to do real-time rev rec and target the projects that need immediate attention.



Sean McDermott
CEO and President, Windward

How we help leaders thrive in the new services economy

CEOs

Grow your business with confidence

In the new services economy, businesses can't grow or evolve without a complete view of the customer.

Uniting CRM with ERP, FinancialForce helps CEOs align their teams across every department, developing amazing customer experiences and spurring financial growth.

CFOs

Drive business model innovation at scale

Time and talent are precious resources. FinancialForce helps CFOs at fast-growing companies optimize their resources to produce new revenue streams and bolster existing ones while eliminating doubt around regulatory compliance.

ClOs

Ensure security & data privacy

Siloed data is the surest path to data insecurity.

FinancialForce helps CIOs establish industry-leading security and data privacy systems in the age of digital transformation, unifying data while reducing complexity and cost.

Chief Services Officers

Maximize the value of customer experience

Superior service translates to strategic advantages.

FinancialForce helps CSOs deliver amazing customer experiences, exceed expectations for revenue growth, and gracefully navigate the convergence of various services disciplines.