

Achieving a 40% Boost in Team Productivity by Automating Standard FinancialForce (Certinia) Capabilities

HIGHLIGHTS



95% Reduction in Milestone Creation Time



50% Decrease in Timecard Follow-Up Time



40% Boost in Team Productivity With Automation



Seamless Qualtrics and Salesforce Integration

THE CUSTOMER

The customer is a leading cloud platform for data engineering, data analytics, and machine learning. The customer develops a web-based platform for working with Spark, that provides automated cluster management and IPython-style notebooks. More than 10,000 organizations worldwide — including Comcast, Condé Nast, Grammarly, and over 50% of the Fortune 500 — rely on it to unify and democratize data, analytics, and AI.

THE CONTEXT

The customer utilized FinancialForce (Now Certinia), a Salesforce-based product, for their operations and faced the following challenges:

- Despite leveraging its standard features, they encountered challenges in automating various Professional Services Automation (PSA) tasks.
- Duplicate Estimated Versus Actuals (EVA) records were generated within the standard FinancialForce (Now Certinia) package, disrupting project reports and calculations crucial for Project Managers.
- Rate cards were not updated, leading to inaccuracies in financial calculations and billing processes.
- Manual distribution of project feedback surveys using Qualtrics wasn't integrated into Salesforce, thus complicating feedback collection.

THE OBJECTIVE

The customer had the following objectives:

- EVA Record Management
- Rate Card Revisions
- Integrate Qualtrics and Salesforce
- Resource Allocation
- Efficient Project Management
- Time-Saving in Monotonous PSA Tasks

THE SOLUTION

- Developed functionality to eliminate duplicate EVAs on projects, addressing a known issue in FinancialForce (Now Certinia).
- Enabled automation for rate card updates on existing data for annual rate revisions.
- Set up Salesforce - Qualtrics integration for customer surveys, resulting in a 70% time saving from manual survey sending and tracking.
- Created a consolidated view of the project layout for planned, scheduled, and submitted hours per project for easy resource and project planning.
- Implemented workspaces, which is a standard FinancialForce (Now Certinia) feature, to handle all project management tasks from one page.
- Sent a consolidated list of resources who missed their timecards to project managers to avoid multiple follow-ups.
- Implemented automatic milestone creation integrated with financial data, drastically reducing task completion time from hours to mere minutes.
- Created various internal forms to enable different types of project creation.
- Enabled automatic license assignment when a PSA resource is onboarded.
- Implemented auto-approval of timecards for internal projects, preventing approval queue hogging and allowing managers to focus on customer-centric projects.
- Added validations on skills and certifications to remove bad data from the system.

THE OUTCOME

With Grazitti's help, the customer was able to achieve the following:

- **Increased Team Productivity:** The implemented automation significantly boosted team productivity by 40%.
- **Milestone Creation Efficiency:** Milestone creation, previously taking 4 hours for 5-10 projects, is now completed in minutes, resulting in a 95% reduction in time.
- **Automated Customer Surveys:** Automation of customer surveys saved 70% of the time compared to manual sending.
- **Improved Data Cleanliness:** Clean data through added data validations on skills and certification ratings, facilitated easier resource allocation on projects with the right skills.
- **Accurate Reporting:** The removal of duplicate EVAs leads to accurate reporting on estimated hours and actuals.