From Opportunity to Renewal: Unified Resource Management for Better Customer Outcomes

April 2025

certinia

Presenters

Victoria Cullinane
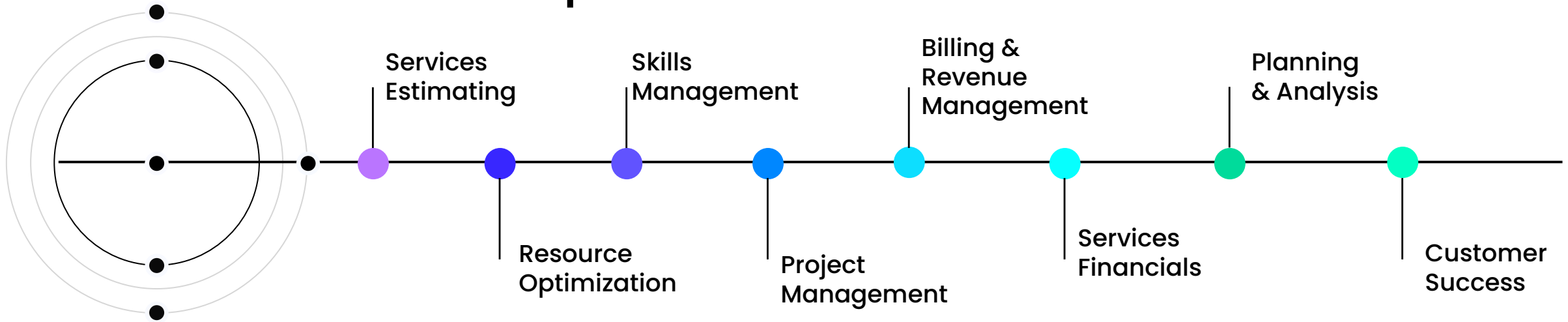Resource Manager
Certinia

Diane Childs
Principal Solution Engineer
Certinia

Agenda

1 Introducing Certinia

2 Resource Management at Certinia

3 Visualization

4 The Future of Resource Management

5 Visualization

6 Summary - Q & A

certinia

The platform for services business

- Services Estimating
- Resource Optimization
- Skills Management
- Project Management
- Billing & Revenue Management
- Services Financials
- Planning & Analysis
- Customer Success

salesforce

~1,400 Customers

~850 Employees

38+ Average NPS

Challenges in Resource Management

Problems to Solve

Reliance on spreadsheets	Not built for services	Siloed teams
Fragile integrations	Stale information	Manual / rigid processes

Metrics to Improve

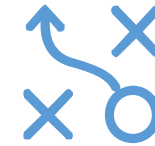|		
Estimate accuracy	Resource utilization	Delivery quality
Revenue capture	Forecast accuracy	Customer retention

The Platform for Services Business
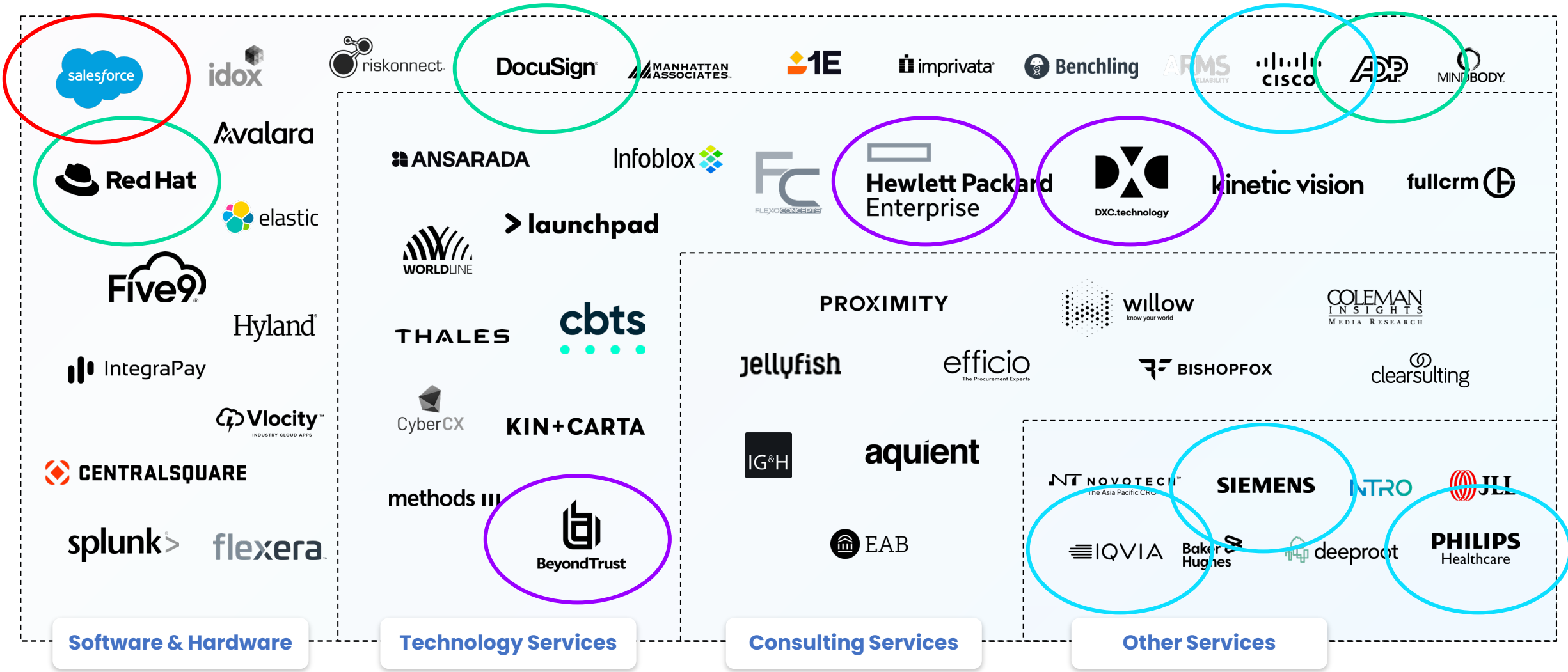
Run a Connected Business

+

Deliver with Intelligence

+

Achieve Business Agility

Create Business Certainty

The Single Source of Certainty

Software & Hardware

Technology Services

Consulting Services

Other Services

In the last 3 years alone, we've integrated 10 companies, added 7,000 users, managed revenue forecasts to 1% variance +/-, increased our sold roles by ~20K roles, and ~14M billable hours. "

Mark Conklin, Senior Director of Operations, Salesforce

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Top Improvement Areas:

1. **Global Consistency**
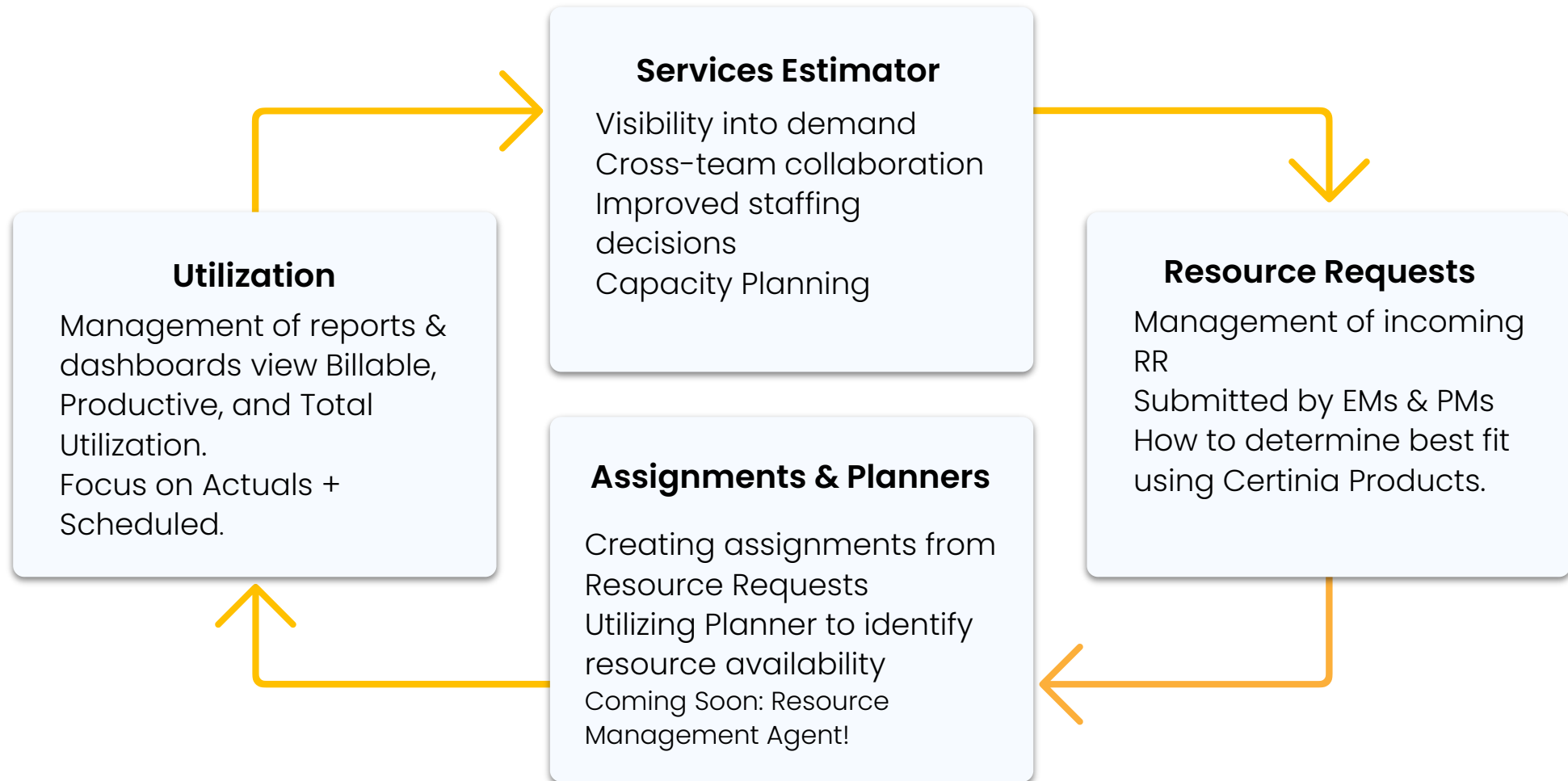   a. Common metrics across geos
   b. Common dashboards

1. **Resource Management**
   b. Established Resource Management Process
   c. Updated Skills Database
   d. Improved Scheduling Process
   e. Improved Utilization Tracking

3. **Services Estimator**
   a. Improved staffing lead times
   b. Improved Resource mix
   c. Improved as-sold margin

Day in the Life of a Resource Manager

Services Estimator

Visibility into demand
Cross-team collaboration
Improved staffing decisions
Capacity Planning

Utilization

Management of reports & dashboards view Billable, Productive, and Total Utilization.
Focus on Actuals + Scheduled.

Resource Requests

Management of incoming RR
Submitted by EMs & PMs
How to determine best fit using Certinia Products.

Assignments & Planners

Creating assignments from Resource Requests
Utilizing Planner to identify resource availability
Coming Soon: Resource Management Agent!

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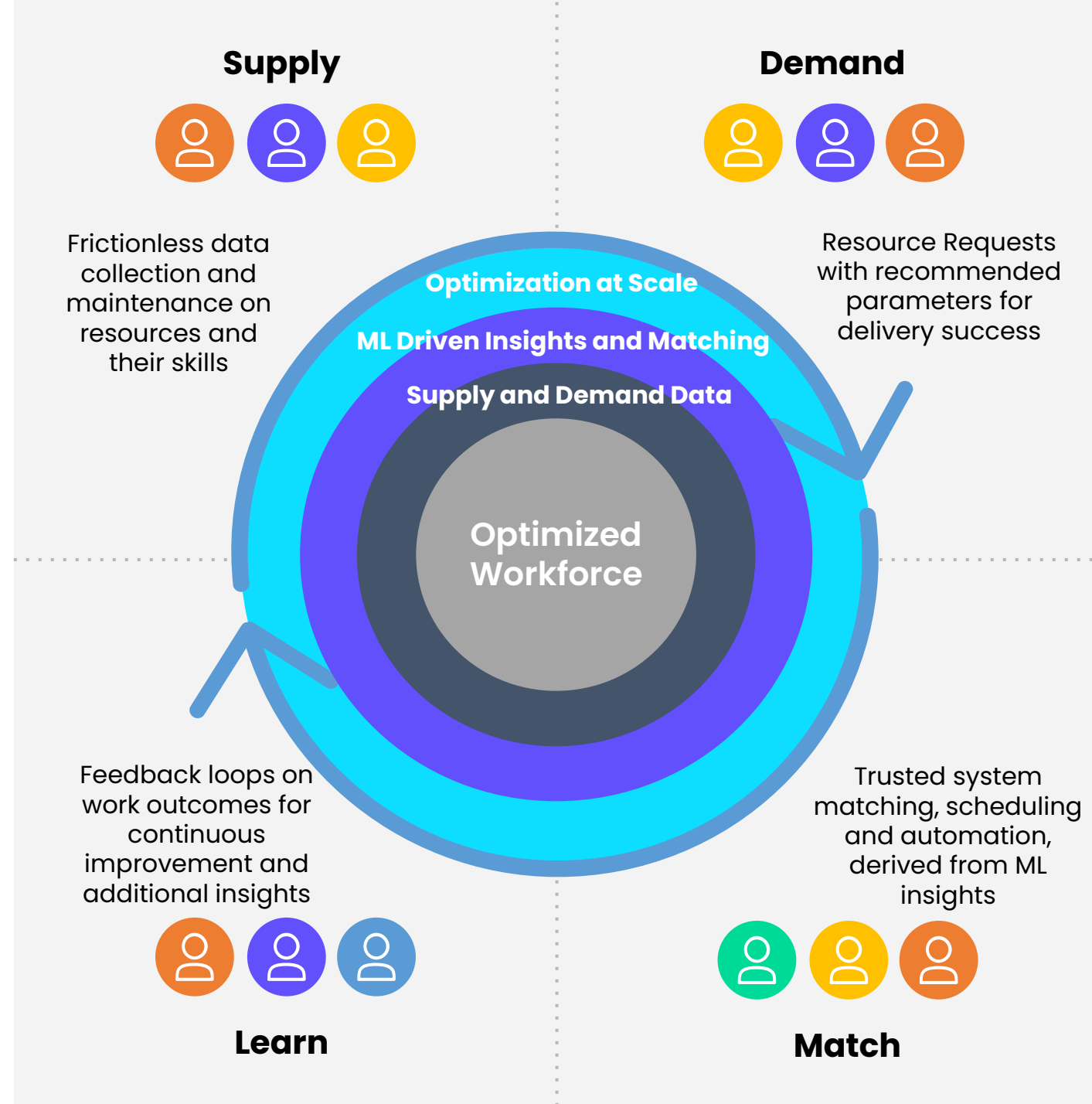**5** Visualization

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Enterprise Resource Optimization

Future State

Trusted Resource Management intelligence, optimizing resources for *your* business goals.

- Outcome based resource recommendations
- Staffing automation
- Skill adjacencies and suggestions
- Resource Optimization

Supply

Frictionless data collection and maintenance on resources and their skills

Demand

Resource Requests with recommended parameters for delivery success

Optimization at Scale

ML Driven Insights and Matching

Supply and Demand Data

Optimized Workforce

Feedback loops on work outcomes for continuous improvement and additional insights

Trusted system matching, scheduling and automation, derived from ML insights

Learn

Match

Coming Soon: Resource Management Agent

Built 100% on Salesforce's Agentforce Technology!

The agent is doing all the work

- scheduling conflict alerts
- Chatbot similarities
- Semi-autonomous
- Ranks Recommendations

RM Use Cases:

- Tactical staffing assistance
- Improved resource request quality
- Reduce bench

Benefits:

- Reduce time to staff
- Improved delivery quality
- Improve billable utilization

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I'd like to cover Anne's work after
November 23rd

No problem! Here's what I came up with:

Describe your task or ask a question up to 2,000 characters...

I'd like to cover Anne's work after
November 23rd

No problem! Here's what I came up with:

I found the following assignments for Anne Brogan scheduled over the 23rd of November

1. Analytics Project - Anne Brogan for the project Analytics Project.
2. Prestige UK Util - Anne Brogan for the project Prestige UK.
3. Prestige UK Software and Services - Project for the project Prestige UK.
4. Prestige UK Software and Services - Training for the project Prestige UK.

Please choose the assignment you would like me to find cover for.

Describe your task or ask a question up to 2,000 characters...

Certinia Agent

Mateo Floyd: Rank 1
- Availability: 100%
- Region: Yes
- Role: Yes
- Skills: 2/3

Samantha Lewis: Rank 2
- Availability: 90%
- Region: Yes
- Role: Yes
- Skills: 1/3

Tim Marklein: Rank 3
- Availability: 85%
- Region: Yes
- Role: Yes
- Skills: 1/3

What action would you like to take?

Some common actions are:
1. Assign a resource
2. Refine search optimized for skill
3. Compare resources

Assign Mateo to this work

I've created a new assignment and will inform **Mateo Floyd** now.

> PA-0000305
> 23 Nov 2025 – 23 May 2026

Would you like to move on to finding cover for the next assignment, Prestige UK Util - Anne Brogan for the project Prestige UK?

Describe your task or ask a question up to

Questions