

# 90% Time Savings Achieved by Replacing Legacy Systems with Salesforce and Certinia

Case Study

## BUSINESS CHALLENGES

One of our leading IT client faced fragmented processes across multiple systems, including Oracle ERP, for key functions like deal creation, project management, and invoicing. This caused inefficiencies, manual work, and integration challenges. They sought to unify operations on a single platform to boost efficiency and scalability.

## OUR SOLUTION

- Implemented Salesforce and customized the Certinia PSA solution to align with the client's unique business requirements.
- Replaced legacy tools with a centralized, scalable system built entirely on the Salesforce platform.
- Designed a custom end-to-end solution that unified all critical business processes.
- Streamlined workflows from initial deal creation to final invoicing within a single integrated ecosystem.

## TECHNOLOGY USED

- Salesforce Platform
- Certinia Professional Services Automation (PSA)
- Customizations within Certinia PSA
- Integration with legacy systems as required

## VALUE DELIVERED

- Achieved **80–90%** time savings in key operational processes.
- Removed dependency on legacy systems like Oracle ERP, eliminating integration bottlenecks and system limitations.
- Replaced Jira-based ticketing for customer and project creation, reducing processing time from several hours to just **2–3 minutes**.
- Eliminated over **1,000** manual billing sheets, resulting in significant time and effort savings.
- Centralized operations into one platform, enabling a unified approach to managing deals, projects, and invoicing.
- Ongoing enhancements to ensure end-to-end business operations remain seamless and scalable.