RUNNING YOUR SERVICES BUSINESS WITH NETSUITE OPENAIR PSA
Professional Services Automation (PSA) Definition

• A software suite that allow users to integrate industry-appropriate metrics in order to better understand operations, improve efficiency and increase profitability.

• PSA provides service professionals, with project management and resource management for internal or client facing projects and utilization rate management for billable staff.

• Automaton of end-to-end “Quotes to Cash” business processes

• ERP is to Finance as PSA is to Services

• ALWAYS a DIRECT impact to $$$
Professional Services Automation Attributes

• **Key areas automated by PSA:**
  • Management and delivery of projects
  • Allocation and staffing of resources
  • Collecting time/expense entry
  • Project billing/accounting
  • Integration with other systems (accounting, CRM, HR, BI)

A services-based business is an enterprise that provides work performed in an expert manner by an individual or team for the benefit of its customers.

• The typical “service” **business** provides products and services including:
  • Business Consulting
  • Implementation/Integration work
  • Services around Software/Hardware sales
  • Shared Services (IT, Marketing, Auditing, Legal, HR, Imbedded Services etc.)
Professional Services Automation KPIs

- Increase Revenue—Reduce Cost—Mitigate Risks
- Improve project margins
- Increase resource utilization rates
- Reduce revenue leakage
- Improved on-time, under budget project delivery rates
- Lower project cancellation rates
- Reduce Days of Sales Outstanding (DSO)
- Enhance customer experience
- Provide meaningful & measurable financial benefits
What is OpenAir?

OpenAir is the best-in-class professional services automation software designed for professional services organizations of all sizes. OpenAir can be easily integrated with ANY ERP, CRM, HCM, BI or other enterprise solution already in place.
OpenAir

- Stand alone or Integrated Project Management, Resource Management, Project Accounting and Time & Expenses Solution
- Acquired by Oracle in November 2016
- +2,600 Global Customers
- Growing by 30%+ in each of the last 14 consecutive quarters!!!
The Industry Leader in Professional Services Automation
• NetSuite OpenAir
  • Can be implemented stand alone or packaged with NetSuite Financials
    ➢ Project Management
    ➢ Advanced Project Accounting
    ➢ Billing
    ➢ Job Costing
    ➢ Revenue Recognition
    ➢ Resource Management
    ➢ Time and expense entry
    ➢ Time Off, Vacation & Unavailable Time Tracking
    ➢ Multiple invoice types
    ➢ Budget tracking
OPENAIR HIGHLIGHTS

1. Single Application Suite – no requirement to buy other modules linked together

2. Ease of use/flexibility – clean UI, quick to execute tasks, configurable on the fly

3. Global-enterprise scale – enterprise customers; multi-sub/currency functionality

4. Speed of deployment – rapid go-live while implementing leading practices
OPENAIR has 10X more PSA deployments than FinancialForce + WorkDay combined!

* 2,600+ customers represent more than 2,600 organizations and subsidiaries globally
## Best in Class Business Visibility is a Must

<table>
<thead>
<tr>
<th>Need</th>
<th>Why?</th>
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<tbody>
<tr>
<td>Real-time Visibility</td>
<td>Eliminate making decisions based on out-of-date data</td>
</tr>
<tr>
<td>Self Service Reporting</td>
<td>Remove IT, or unnecessary resources, from process</td>
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<tr>
<td>Integration into Experience</td>
<td>Ensures analytics are actionable, part of everyday activities</td>
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<tr>
<td>Shared View of Data</td>
<td>Everyone is making decisions on the same data</td>
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<tr>
<td>Role-based Dashboards</td>
<td>Ensure everyone has the relevant data at hand</td>
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<tr>
<td>Summary to Detail</td>
<td>Provide clear line of sight from trend/KPI to solution</td>
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## BUSINESS INTELLIGENCE FOR ALL

<table>
<thead>
<tr>
<th>What is my...</th>
<th>Analyze...</th>
<th>Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Profitability</td>
<td>• Project Cost</td>
<td>• What is our investment in this engagement?</td>
</tr>
<tr>
<td></td>
<td>• Services Revenue</td>
<td>• Are our rates competitive and are we profitable?</td>
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<td></td>
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<tr>
<td>Resource Utilization</td>
<td>• Resource Availability</td>
<td>• Who is over or under-worked?</td>
</tr>
<tr>
<td></td>
<td>• Capacity</td>
<td>• Can I handle upcoming demand?</td>
</tr>
<tr>
<td></td>
<td>• Skills Inventory</td>
<td>• Do I have the right skills and team in place?</td>
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<tr>
<td></td>
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</tr>
<tr>
<td>Project Progress</td>
<td>• Deliverables</td>
<td>• Are we on track and meeting our timeline?</td>
</tr>
<tr>
<td></td>
<td>• Milestones</td>
<td>• Are we able to deliver work and meet our customers’ needs?</td>
</tr>
<tr>
<td></td>
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<tr>
<td>Accounting Process</td>
<td>• Billing</td>
<td>• Are we billing based on contract terms?</td>
</tr>
<tr>
<td></td>
<td>• Revenue Recognition</td>
<td>• Are we minimizing errors and getting paid in a timely manner?</td>
</tr>
<tr>
<td></td>
<td>• Invoice Status and Aging</td>
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</tbody>
</table>
ORACLE OPENAIR PSA CLOUD JOURNEY

**Standalone**
- Project Financials
- Project Execution
- OpenAir
  - Mobile
  - Cloud
  - Analytics

**Integrated**
- Project Financials
- Project Execution
  - CX
  - HCM
  - SCM
  - EPM
  - ERP

**Hybrid**
- Project Financials
  - Project Execution
  - PeopleSoft
  - E-Business Suite
  - JD Edwards
  - Other

Social
100% OF CUSTOMERS ARE ON THE SAME RELEASE

Two major upgrades per year
Ongoing minor upgrades throughout the year
Release preview environment

Customizations carry forward
Customer use cases incorporated in QA testing
INFINITE GRID COMPUTE

SCALABILITY
- Modern small iron grid layout
- Multi-tenancy
- Relational persistence for intelligent data

AVAILABILITY
- Real time monitoring and control
- Disk redundancy
- Hot backup

EFFICIENCY
- In-memory compute
- Multi-level caching
- Solid state disk

SECURE
- Physical
- Network
- Logical
- Application
Our Platform is a comprehensive offering of configurability, cloud development tools and infrastructure that enables customers and software developers to maximize the benefits of cloud computing. OpenAir is architected as a multi-tenant cloud platform that provides the core infrastructure, including support, for industrial-strength standards of high availability, disaster recovery and security as well as an integrated scripting capability and a set of APIs to build and connect applications to the platform.
UNIFIED DATA
SINGLE DATABASE ENABLES BI FOR ALL USERS

- Simple, Self-Service Reporting on a Unified Set of Data
- Industry-Leading Reporting Suite
- Automated Business Processes Drive Efficiencies
- Real-time Alerts Enable Active Business Monitoring
KEY METRICS

• Percentage of Projects Delivered On-time
  13%

• Increase of Employees that are Billable
  13%

• More Project Margin for T&M Projects
  43%

• More Revenue per Employee
  24%

• Annual Revenue Per Billable Consultant increased by (k)
  $49K

• Billable Utilization increased by
  7%

Advantage of a Best-in-Class PSA Solution
LIVE DEMO
THANK YOU FOR YOUR TIME AND ATTENTION
QUESTIONS AND ANSWERS