The Business Value of Kantata

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BUSINESS VALUE HIGHLIGHTS

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$17 million
in average annual benefits

33%
more projects delivered on time

12%
shorter average project length

61%
decrease in projects running over budget

40%
improvement in resource planning accuracy

78%
improvement in portfolio-level reporting accuracy

60%
decrease in projects receiving complaints or being escalated

32%
increase in employee satisfaction

16.7%
average increase in billable hours per consultant

Executive Summary

IDC conducted research to assess the business value and operational impact of Kantata's platform for organizations navigating challenges in project delivery, resource management, and financial visibility. Based on in-depth interviews with five Kantata customers and IDC's Business Value methodology, the study quantifies the benefits organizations achieved by adopting Kantata across key areas of staff productivity, business enablement, and operational efficiency.

IDC calculates that organizations using Kantata realized an average annual benefit of $17 million, driven by improvements in project execution, resource utilization, financial operations, and business development. These benefits were achieved not through headcount reductions but by reclaiming time previously spent on manual tasks and enabling teams to focus on strategic, client-facing, and revenue-generating activities.

Organizations achieved measurable value in the following areas:

- Enhancing project delivery and control, enabling teams to complete projects more efficiently, reduce delays, and proactively manage budgets and scope

- Improving resource planning and staffing agility, allowing organizations to align skills with demand earlier in the sales cycle and make faster, more informed staffing decisions
- Boosting financial operations, streamlining invoicing and period-end processes, improving forecasting accuracy, and enabling finance teams to operate with greater speed and precision
- Increasing billable hours and revenue capture through better visibility into utilization and more effective deployment of internal resources
- Reducing revenue and cost leakage by enabling early detection of discrepancies and improving alignment between contracted work and actual delivery
- Empowering business development and client engagement, with improved collaboration across sales and delivery teams and better visibility into project health and budget utilization
- Improving reporting and analytics efficiency by centralizing data and automating dashboards, enabling faster decision-making and more accurate insights across the organization

Kantata's Professional Services Automation (PSA) platform enabled organizations to move from fragmented, manual systems to a unified, data-driven operating model. The platform's integration with CRM and ERP systems, real-time dashboards, and AI-powered analytics helped professional services teams scale operations, improve margins, and deliver greater value to clients.

Situation Overview

Professional services organizations are under pressure from multiple sides. Clients demand fixed-price, outcome-based contracts that are risky to deliver. Furthermore, they expect real-time transparency into project status, costs, and outcomes and have less tolerance for delays and scope creep. Services organizations face a shortage of specialized skills (e.g., AI, cybersecurity, and sustainability), rising salaries, and global competition for talent, resulting in a profitability squeeze.

As a result of these changes, professional services delivery is moving from people-heavy and manual projects that are delivered on a time and materials basis. Instead, services delivery is moving toward data-driven pricing and scheduling, automation of project planning and billing, and outcome-based engagements.

Additionally, traditional consulting services are increasingly combining with managed services and technology-based services delivery.

Professional services providers are increasingly deploying PSA solutions, such as Kantata, applying AI to planning processes, and embracing hybrid delivery approaches.

Kantata Overview

Kantata PSA is a cloud-native platform designed specifically for professional services firms (consultancies, agencies, IT services, and tech-enabled teams) looking to streamline delivery, billing, and resourcing in a single system. Born from the 2022 merger of two PSA pioneers, Mavenlink and Kimble Applications, Kantata combines deep domain expertise with modern user experience and cloud architecture.

The platform comes in two flavors: Kantata OX (formerly Mavenlink), which is a standalone, cloud-based PSA platform not tied to a specific CRM or ERP, and Kantata SX (formerly Kimble), which is Salesforce-native and leverages that ecosystem for tight CRM integration and analytics.

Kantata offers a broad set of PSA capabilities, including resource and project management, planning, time and expense tracking, invoicing, forecasting, and real-time dashboards. This supports professional services organizations across proposal, planning, delivery, and billing stages. Furthermore, AI-powered analytics increasingly permeate the solution with predictions, guides, and optimizations.

The Business Value of Kantata

Study Firmographics

IDC conducted five in-depth interviews with Kantata customers with the goal of understanding the impact and resulting benefits of adopting Kantata as part of their professional services organization environments. The organizations had a median of 250 employees, with up to 4,000 consultants and 600 resource managers supported by Kantata.

The platform managed up to 12,000 projects annually, demonstrating its scalability. IT environments varied widely, with up to 125 business applications and 80 IT staff per organization. Kantata's adaptability across these diverse operational models was a key strength.

TABLE 1

Firmographics of Interviewed Organizations

Firmographics	Average	Median	Range
Number of employees	1,900	250	148–7,500
Number of IT staff	36	30	4–80
Number of business applications	71	55	7–125
Consultants working on project delivery	1,190	337	76–4,000
Project management teams	110	16	10–400
Resource management teams	200	6	1–600
Annual revenue	$370,600,000	$165,000,000	$5M–$995M
Countries	The United States (3), France, the United Kingdom		
Industries	IT Consulting, Web Development, Managed Services, Digital Strategy, Healthcare Technology		

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Kantata was deeply embedded in daily operations, with some organizations reporting usage by up to 80% of employees. Daily active users ranged from 50 to 4,000. Kantata supported project planning, time tracking, resource allocation, and financial forecasting. Integration with Salesforce and ERP systems enabled seamless dataflow, reducing duplication and improving reporting accuracy.

TABLE 2

Organizational Usage of Kantata

Usage	Average	Median	Range
Number of Kantata licenses	1,300	425	80–5,000
Number of daily active users of Kantata	950	250	50–4,000
Number of projects per year on Kantata	3,330	575	150–12,000
Number of customers/clients served via the Kantata platform	290	100	51–900

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Use and Choice of Kantata

Organizations that adopted Kantata were often grappling with fragmented systems, manual processes, and inconsistent practices across teams. Prior solutions, ranging from homegrown tools to spreadsheets, were difficult to maintain and lacked the scalability needed for growth. Kantata was chosen for its ability to unify operations, provide end-to-end visibility from sales to invoicing, and integrate seamlessly with existing CRM platforms. Customers emphasized the importance of having a centralized solution that could standardize workflows, automate project creation, and support strategic planning without relying on manual intervention.

Interviewees consistently cited Kantata's integration with Salesforce as a key differentiator. One organization described how Kantata could be embedded directly into Salesforce, automatically linking sales opportunities to project plans, eliminating the need for manual setup, and ensuring alignment between sales and delivery teams.

Another noted that Kantata's ability to manage everything from proposals to invoicing made it a comprehensive solution that supported their entire customer life cycle:

IT consulting:
"Before adopting Kantata, we relied on a single, internally developed tool to manage activities, timesheets, and invoicing. It was very limited and difficult to maintain. We also lacked standardized practices and processes across the group. Each team operated differently, and even with that one tool, managers often used their own Excel calculations to report figures. We needed a robust, unified solution to manage our key activities from sales through to invoicing."

Web development:
"We used a homegrown system that got us through daily operations, but as we scaled, gaps became clear, especially in forecasting and availability. It lacked the granularity we needed and required too much internal effort to maintain. We needed a more robust, low-overhead solution."

Managed services:
"As a private equity-backed company growing through acquisitions and organically, we faced major system fragmentation after three acquisitions. To support future scale and meet aggressive growth expectations, we needed to consolidate and build a strong ERP foundation. Fortunately, that's exactly what we've achieved."

Digital strategy:
"We adopted Kantata in 2022 to create a single source of truth. As a consulting firm, our project financials were scattered across spreadsheets, making it hard to get a clear view of our portfolio. Kantata gave us both high-level and granular visibility plus forward-looking resource planning, moving us from reactive to proactive."

Qualified Benefits with Kantata

After implementing Kantata, organizations reported substantial improvements in operational efficiency, financial visibility, and strategic agility. The platform enabled standardized workflows, streamlined onboarding, and faster month-end close processes. Teams gained access to real-time data for planning and estimating, which improved pricing accuracy and responsiveness to client needs. Kantata also helped shift organizations from reactive to proactive resource planning, enhancing forecasting and enabling better alignment between delivery and business development.

These benefits translated into increased deal wins, improved margins, and more effective staff allocation:

IT consulting:
"Kantata made it easy to integrate new entities and establish common practices across our group. We now have standardized workflows, especially helpful for onboarding. Month-end close went from 10–15 days to just 4 — and in one geography, we close in a single day. We're managing more, with greater accuracy, using fewer resources."

Web development:
"Kantata has given us clear visibility into planning and estimating work. The estimation tools let us tailor services, whether time and materials or fixed bid, making us more flexible and responsive to client needs. We now rely on data instead of manual reviews, with a systematized way to compare estimates to actuals. That's helped us price competitively and win more deals."

Digital strategy:
"Centralized reporting with Kantata replaced our Excel-heavy workflows, saving time and reducing complexity. It's helped us manage staff more effectively, understand pipeline demands, and plan resources proactively. We've become a more allocation-focused organization, directly improving financial forecasting. While change management was a challenge, adopting this new approach has been hugely beneficial for the company."

Organizations reduced administrative overhead, improved forecasting accuracy, and unlocked new revenue opportunities.

Interview data revealed that Kantata's impact extended beyond operational improvements. It supported organizational growth by enabling the integration of newly acquired entities, standardizing processes, and providing a scalable foundation for expansion. In one case, Kantata's reporting capabilities gave investors confidence to pursue further acquisitions knowing that the platform could support reliable integration and oversight.

The average annual benefit per organization was **$17 million,** split evenly between:

- **$8.8 million in staff productivity gains** (project/resource/finance/analytics teams)
- **$8.2 million in business enablement** (billable hours, revenue leakage avoidance, upsell opportunities)

Organizations emphasized that these gains were not achieved through headcount reductions but by reclaiming time previously spent on manual tasks. This additional productive time allowed teams to focus on strategic initiatives, improve client engagement, and support business growth.

Project Management Benefits with Kantata

Project managers transitioned from manual forecasting and reporting to automated tools. Kantata's estimation features enabled accurate scoping and pricing, helping teams win more deals and deliver on time. Weekly metric reviews and health status tracking reduced budget overruns and client escalations. PMs gained strategic visibility, allowing for proactive issue resolution and better alignment with finance and delivery teams.

Interviewed organizations described how Kantata helped them avoid scope creep by clearly defining project boundaries and linking estimates to actuals.

Another noted that Kantata's dashboards provided a unified view for PMs, CFOs, and department heads, enabling faster decisions and reducing miscommunication:

Web development:
"The project management team quickly embraced Kantata, as their previous forecasting and reporting processes were entirely manual. Having a dedicated tool made an immediate impact."

Healthcare technology:
"We've seen clear improvements in speed and productivity thanks to Kantata's capabilities and our sales and operations planning. Having the right people and resources in place at the right time has made a real difference."

IT consulting:
"The role of the project manager has evolved significantly. They now have deeper insight into their projects, and we've seen fewer errors and miscommunications between project managers and back-office teams."

Managed services:
"We now manage by exception. If a project overruns, it's a conscious investment, not a surprise. Kantata gives us early warnings through key indicators, so project managers are always aware of what's happening and can forecast accurately. No one operates blindly anymore."

Kantata significantly improved the operational efficiency of project management teams by streamlining workflows and reducing manual effort. Before Kantata, organizations required an average of 124.9 full-time equivalents (FTEs) to manage project activities. After implementation, this dropped to 98.4 FTEs, resulting in a 21.3% efficiency gain and gains of $1.86 million annually in staff time that could be used for higher-value and customer-facing activities.

Importantly, these gains were not achieved through staff reductions. Instead, Kantata enabled project managers to reclaim time previously spent on administrative tasks, allowing them to focus on strategic delivery. In one interview, an organization reported a 10%–15% reduction in “busy work” and a corresponding increase in time available for client-facing and innovative activities. Kantata helped create internal alignment, enabling project managers to communicate with finance and executive teams more effectively, resulting in more accurate fact-based decision-making.

TABLE 3

Project Management Team Efficiency

Team Efficiency	Before Kantata	With Kantata	Difference	Benefit
FTEs required for equivalent tasks	124.9	**98.4**	26.5	21.3%
Value of staff time required for equivalent activities	$8,746,600	**$6,888,000**	$1,858,600	21.3%

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Organizations using Kantata reported a **12% reduction in average project duration** and a **33% increase in on-time delivery.** These improvements were driven by Kantata’s integrated planning tools, including Gantt charts, task tracking, and real-time burn analysis.

Interviewees highlighted how Kantata helped avoid common delays by aligning resource deployment with operational readiness. Further, IDC heard how organizations previously sent resources to sites without the necessary parts, resulting in wasted time. With Kantata, they now coordinate installations based on part availability, reducing idle time and enabling the completion of additional tasks in the same week.

Kantata’s real-time budget tracking and forecasting tools enabled tighter financial control and significantly reduced project overruns. Organizations saw a **61% decrease in projects running over budget** after adopting Kantata.

Dependable standardized periodic data reconciliation and proactive alerts helped teams catch issues early, avoiding surprises at project close. Kantata also helped organizations manage scope creep by clearly defining project boundaries and linking estimates to actuals.

One organization noted that Kantata's visibility into burn rates and forecasted end dates allowed them to intervene before budgets were exceeded, transforming budget management from reactive to proactive: *"Kantata has given us much better visibility into project burn and forecasted end dates. We're now able to catch issues early, reducing overruns and eliminating surprises. Before, we'd reach the end of a project and wonder where the overages came from. Now, with weekly metric reviews and proactive alerts, we have far more control over our project portfolio."*

Kantata enhanced portfolio-level reporting by standardizing time tracking and utilization reviews. Organizations reported a **78% improvement in reporting accuracy,** driven by weekly timesheet submissions and real-time data access.

Kantata helped avoid major project failures by surfacing early warnings and enabling timely intervention. Another noted that before Kantata, they had no visibility into which tasks required more time or which product lines were underpriced. With Kantata, they now use historical data to improve future estimates and pricing strategies: *"Standardizing time tracking with weekly timesheet submissions has been a major organizational improvement. It's directly enhanced reporting accuracy, especially in weekly meetings where we review utilization by department and individual. Identifying underutilization is now much easier and more actionable."*

Client satisfaction improved significantly, with a **60% decrease in projects receiving complaints or being escalated.** Kantata enabled early visibility into risks and structured feedback loops, allowing teams to engage clients proactively.

Organizations implemented weekly health status reviews using Kantata's dashboards, flagging issues before they escalated. One customer described how they required PMs to log project health notes and categorize statuses, creating accountability and a clear audit trail. Kantata PSA's capabilities were instrumental in helping organizations create, send, and manage their customer satisfaction score (CSAT) surveys, allowing them to respond immediately to low scores, improving client retention and satisfaction: *"Kantata gives us early visibility into budget risks, allowing us to engage clients proactively before issues arise. That transparency makes tough conversations easier. We also use Kantata for CSAT surveys, helping us celebrate wins and quickly address any client concerns. It's a key part of how we manage engagement."*

Resource Management Benefits with Kantata

Resource planning became more strategic and collaborative with Kantata, resulting in a **40% improvement in resource planning accuracy.** By integrating with CRM systems, Kantata enabled staffing discussions to begin at the opportunity stage, aligning skill sets with pipeline demand.

Organizations described how this shift allowed them to train bench resources in anticipation of new service offerings. One interviewee explained that when their sales team began selling new services, they could proactively prepare internal staff, reducing reliance on contractors and improving project readiness: *"Resource management is now far more collaborative and proactive. Our resource manager uses Kantata in real time with stakeholders to make informed decisions on reallocations or staffing. We've shifted from reactive resourcing to planning early, starting at the opportunity stage in our CRM software. This includes aligning skill sets with sales strategy, so if we're selling new services, we're training our bench accordingly. It's been a major improvement."*

Resource management teams saw transformative improvements in their ability to plan, allocate, and optimize staffing across projects. Kantata's centralized planning tools and real-time visibility into resource availability enabled organizations to reclaim nearly 30% of their time, not by reducing staff, but by eliminating inefficiencies and manual coordination.

Kantata helped organizations transition to a single dedicated resource manager overseeing all allocations, supported by a structured ticketing system. This shift reduced miscommunication and ensured that staffing decisions were made collaboratively and based on accurate data.

TABLE 4

Resource Management Team Efficiency

Team Efficiency	Before Kantata	With Kantata	Difference	Benefit
FTEs required for equivalent tasks	215.2	**151.2**	64.0	29.7%
Value of staff time required for equivalent activities	$15,065,200	**$10,587,500**	$4,477,700	29.7%

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Staffing decisions became 60% faster on average with Kantata. The platform enabled organizations to forecast demand earlier in the sales cycle, allowing them to align training with pipeline trends and prepare bench resources for upcoming projects.

IDC heard from one of the interviewed organizations how Kantata helped them avoid last-minute staffing by integrating sales data with resource planning. When a new service was added to the portfolio, they could identify skill gaps and initiate training before deals closed.

This proactive approach replaced reactive staffing models and improved project readiness: *"Kantata has transformed how we forecast and prepare for new deals. Instead of reacting after a sale closes, we now plan ahead, aligning resources and training based on incoming demand. There's real collaboration between sales and resourcing, which makes staffing faster and far more effective."*

- Kantata **increased employee satisfaction by 32%.** The increase in satisfaction also had downstream effects on organizational performance. Employees were more engaged, more productive, and more likely to stay with the company. One organization noted that improved visibility into utilization allowed them to reassign underused staff to internal initiatives or training, which not only boosted morale but also strengthened their talent pipeline and decreased burnout risk. Another organization emphasized that Kantata's ability to support proactive staffing and skill development helped prepare for new service offerings, creating a sense of growth and opportunity among employees.

The platform also supported contractor management, enabling teams to track contract terms and plan transitions to internal staff. One organization noted that Kantata helped reduce contractor usage by 30%, not by eliminating roles, but by making more informed decisions about when and how to engage external resources. Overall, Kantata helped improve hiring forecasting by 18%.

Finance Teams Benefits with Kantata

Finance teams experienced transformative gains in speed, accuracy, and visibility after adopting Kantata. The platform streamlined invoicing and month-end close processes, reducing the time and effort required to reconcile data and generate reports. Real-time access to project timelines and resource allocations enabled more accurate forecasting and improved financial outcomes.

Customers highlighted how Kantata's automation and integration capabilities allowed finance teams to operate more strategically, aligning billing with delivery milestones and enhancing overall financial performance:

Managed services:
"We've seen a significant improvement to our month-end close in professional services, from taking over a week to just a few days. With a large finance team supporting our acquisitive, PE-backed structure, this efficiency is a major win."

Digital strategy:
"Kantata has all the metrics we need, and its invoicing tools alone save us significant time. What used to be a manual, time-consuming process is now just a couple of clicks. That efficiency has been a major win for our financial team."

Healthcare technology:
"With Kantata, we've gained the ability to connect systems and unify project data, meaning financial teams gain real-time visibility into project timelines. As Gantt charts and project plans are implemented, they can track when projects begin, when materials are shipped, and when resources are allocated – enabling more accurate forecasting and better financial outcomes."

Digital strategy:
"End-of-month invoicing used to be a manual, time-consuming process involving Excel exports and rate adjustments. Now, we invoice all clients directly through Kantata in just a couple of days, provided the data is ready. It's a much smoother process and a huge relief for the team."

Finance teams achieved a 51.5% efficiency gain with Kantata. The number of FTEs required for financial operations dropped from 64.5 to 31.3, resulting in $2.33 million in annual productivity gains. These gains were not due to staff reductions but to the elimination of manual processes and the automation of key workflows.

TABLE 5
Finance Team Efficiency

Team Efficiency	Before Kantata	With Kantata	Difference	Benefit
FTEs required for equivalent tasks	64.5	**31.3**	33.2	51.5%
Value of staff time required for equivalent activities	$4,514,700	**$2,187,500**	$2,327,200	51.5%

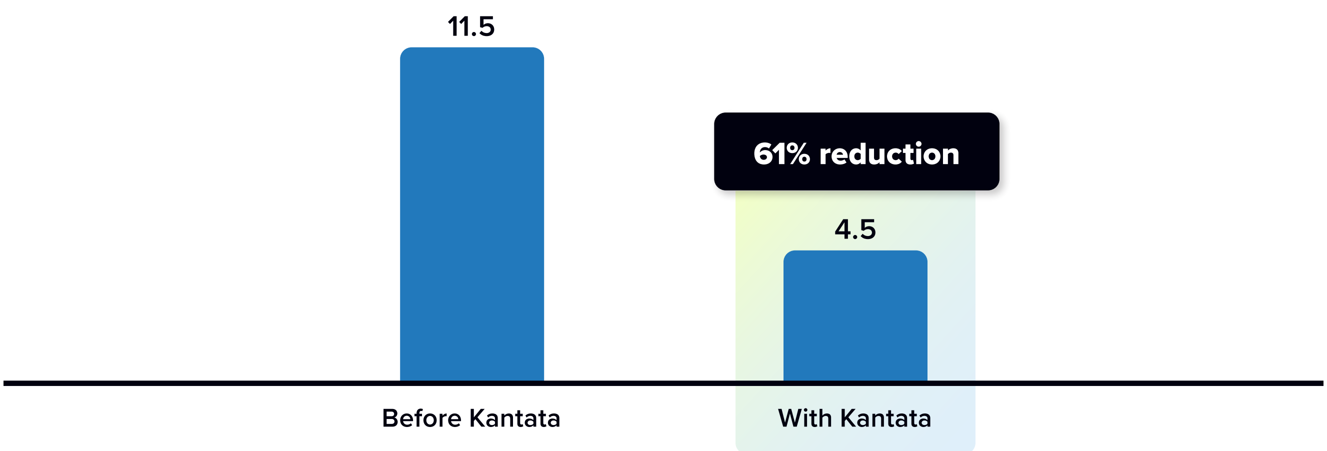
n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Period-end processes were dramatically accelerated, with month-end close time reduced by 61%, from 11.5 days to just 4.5 days. Kantata's integration with project plans and ERP systems allowed finance teams to track project start dates, material shipments, and resource deployment.

FIGURE 1

Period-End Finance Process Benefits with Kantata

(Number of days to close the books at the end of the month)



n = 5; Source: IDC Business Value Research, September 2025

Kantata improved the efficiency of BI and analytics teams by 50%, reducing the number of FTEs required from six to three and saving $210,000 annually. The platform centralized data and enabled automated reporting, allowing for the generation of dashboards in minutes instead of days.

Interviewees described how Kantata helped them move from fragmented spreadsheets to a unified reporting environment. Kantata's analytics capabilities enabled organizations to surface trends that were previously invisible, such as underutilization, project burn, and allocation gaps. Another emphasized that Kantata's real-time data enabled faster decision-making, with one team reporting a 20% improvement in decision speed.

TABLE 6

Business Intelligence/Analytics Team Efficiency

Team Efficiency	Before Kantata	With Kantata	Difference	Benefit
FTEs required for equivalent tasks	6.0	**3.0**	3.0	50%
Value of staff time required for equivalent activities	$420,000	**$210,000**	$210,000	50%

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Business Benefits with Kantata

Kantata empowered organizations to unlock new business opportunities by improving collaboration across sales, finance, and delivery functions. Enhanced visibility into project health and budget utilization enabled teams to identify upsell and cross-sell opportunities earlier and more effectively.

Integration with CRM systems allowed for faster proposal generation and more agile client engagement:

Digital strategy:
"With shared visibility into key data, everyone's working from the same numbers, which has driven a roughly 60% increase in upsell and cross-sell opportunities. When a contract nears full utilization, we can proactively initiate change requests or upsells to secure more budget. The integration between Kantata and our CRM has been a game-changer, allowing us to kick off projects early in the sales cycle, align resources, and follow a standardized process that didn't exist before. It's transformed how we operate."

Web development:
"The ability to get proposals and estimates out the door, something that used to take weeks, has dramatically improved. We're now able to turn them around much faster thanks to the templates and functionality available in Kantata. As a result, our conversations often start at step C or D instead of step A every single time, which has really accelerated our business enablement."

Kantata unlocked $8.24 million in additional annual revenue across the five researched organizations. **Table 7** (next page) details how this additional revenue was distributed across the areas of generation.

Organizations emphasized that improved visibility, proactive planning, and better alignment between sales and delivery drove these gains. One customer noted that Kantata helped them manage by exception, allowing teams to focus on strategic interventions rather than routine oversight.

TABLE 7

Additional Revenue with Kantata

Additional Revenue	Difference
Billable hours benefits	$3,346,900
Revenue and cost leakage avoidance benefits	$3,706,000
Other business enablement (upsell, cross-sell)	$1,187,600
Total additional annual revenue	$8,240,500

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Billable Hours Benefits with Kantata

Organizations saw a 16.7% increase in billable hours, generating $3.35 million in additional annual revenue (**Table 8**). Kantata helped optimize resource deployment and improve delivery efficiency.

TABLE 8

Billable Hours Utilization Benefits with Kantata

Billable Hours Utilization Benefits	Before Kantata	With Kantata	Difference	Benefit
Annual billable hours	449,400	**539,300**	89,900	16.7%
Consultants working on project delivery (FTEs)	281.25	**337.50**	56.25	16.7%
Additional annual revenue	$16,734,375	**$20,081,250**	$3,346,875	16.7%

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

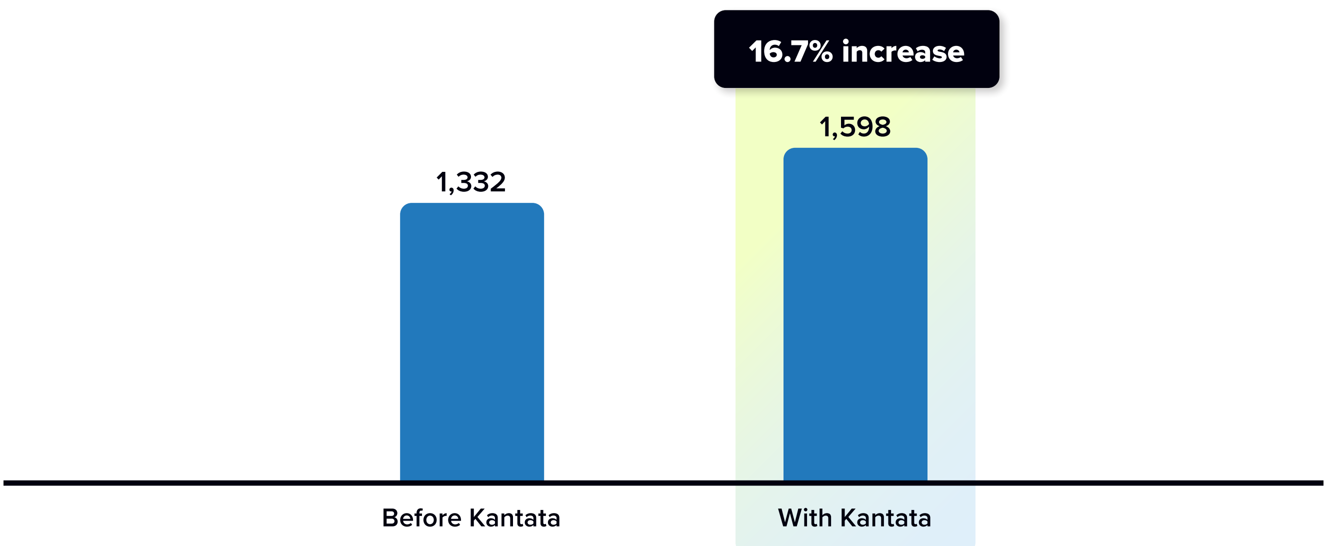
The number of annual billable hours rose from 449,400 to 539,300 when recalculated on a full-time employee contract basis, yielding an increase from 281.3 to 337.5 with Kantata. This calculation assumes a maximal utilization rate of 85% and a 1,880-hour work year. Kantata's time tracking and allocation tools allowed teams to monitor utilization in real time and reassign underused staff to revenue-generating work. Interviewees described how Kantata helped them identify underutilized employees and shift them to client-facing work or internal projects. One organization noted that this visibility helped them avoid idle time and improve overall productivity.

Billable hours per consultant increased from 1,332 to 1,598 annually, a 16.7% improvement (**Figure 2**). Kantata streamlined scheduling and time tracking, allowing consultants to focus more on client-facing work.

FIGURE 2

Billable Hours per Consultant

(Number of hours, annually)



n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Revenue and Cost Leakage Avoidance with Kantata

Organizations reduced revenue and cost leakage by 1%, saving $3.71 million annually (**Table 9**). Kantata made financial data visible and actionable, enabling teams to compare contracted amounts with actual burn, track allocations, and flag discrepancies early.

TABLE 9

Revenue and Cost Leakage Avoidance

Revenue and Cost Leakage Avoidance Benefits	Before Kantata	With Kantata	Difference	Benefit
Quantified revenue and cost leakage reduction annually	$366,894,000	**$370,600,000**	$3,706,000	1%

n = 5; Source: IDC Business Value In-Depth Interviews, September 2025

Challenges/Opportunities

Despite the clear value that professional services automation provides, Kantata often competes against inertia (i.e., carrying on as usual) or is unable to sell due to the customers' budgetary constraints. Another challenge for Kantata is the learning curve required for successful adoption, combined with its enterprise-level subscription fees. In addition, managing two PSA product lines (OX and SX) on two different codebases increases Kantata's complexity and internal overhead.

Kantata faces exciting opportunities related to its current position. It has a strong brand in PSA, over 1,500 customers across over 100 countries, and broad functional coverage across the PSA spectrum, which is a powerful base to expand on. AI-powered functionality (such as the AI-driven analysis and interpretation of data gathered via Kantata Pulse) can add real value to customers and help users at all levels make sense of data and make decisions faster. Finally, the combined Mavenlink and Kimble customer base gives Kantata a global scale and strong synergies in operations and sales.

Conclusion

Kantata delivers measurable value across project delivery, resource management, and financial operations. Organizations achieved significant gains in efficiency, visibility, and revenue growth. Kantata's PSA platform enabled scalable, data-driven operations that supported both tactical execution and strategic goals.

Whether improving margins, reducing overhead, or enhancing client engagement, Kantata proved to be a transformative investment. Interviewees consistently emphasized the platform's role in enabling proactive planning, cross-functional collaboration, and confident decision-making. Kantata helped organizations move from fragmented systems to a unified, intelligent operating model — one that supports growth, agility, and long-term success.

Beyond operational improvements, Kantata also contributed to a more resilient and people-centric organizational culture. By reducing administrative burden and improving transparency, the platform helped teams feel more empowered and engaged. This uplift in employee satisfaction translated into stronger retention, better performance, and a more sustainable talent pipeline — critical advantages for professional services organizations whose success depends on the quality, motivation, and continuity of their workforce.

Appendix: Methodology

IDC's standard methodology was utilized for this project. This methodology is based on gathering data from current users of Kantata as the foundation for the model.

Based on interviews with organizations using Kantata, IDC gathered quantitative benefit information during the interviews using a before-and-after assessment of the impact of Kantata.

In this study, the benefits included staff productivity, business enablement, operational efficiency, and financial performance.

IDC bases the calculations on a number of assumptions, which are summarized as follows:

- **Time values are multiplied by burdened salary (salary + 28% for benefits and overhead) to quantify efficiency and productivity savings.** For the purposes of this analysis, IDC has used assumptions of an average fully loaded $100,000 per year salary for IT staff members and an average fully loaded salary of $70,000 for non-IT staff members. IDC assumes that employees work 1,880 hours per year (47 weeks x 40 hours).

Note: All numbers in this document may not be exact due to rounding.

About the IDC Analysts

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Bo Lykkegaard is associate vice president for the enterprise-software-related expertise centers in Europe. His team focuses on the $172 billion European software market, specifically on business applications, customer experience, business analytics, and artificial intelligence. Specific research areas include market analysis, competitive analysis, end-user case studies and surveys, thought leadership, and custom market models.

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Ladislav Kinda is a consultant in the IDC Business Value Strategy practice team. Kinda conducts customized business value research and consulting projects for clients across various technology domains. His primary focus is assessing the return on investment from their adoption of enterprise technologies. Kinda's research delves into how organizations leverage digital technology solutions and initiatives to enhance efficiency and drive business growth.

More about Ladislav Kinda

Message from the Sponsor

Kantata

Scaling a professional services business today isn't about adding more hours — it's about smarter technology. Kantata Professional Services Automation (PSA) brings projects, people, and AI agents together in one unified platform, giving services leaders the clarity and control they need to see further, move faster, and stay ahead.

With Kantata, organizations replace disconnected tools and data silos with real-time visibility into forecasting, resourcing, delivery, and financial performance. The result is greater agility, higher profitability, and better-informed decisions that keep firms resilient in a rapidly changing market.

Discover how Kantata helps services organizations adapt with confidence

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