

KANTATA™

The Kantata
Professional Services
Cloud: Purpose-Built
Technology for
Unmatched Advantage

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INTRODUCTION

Professional services firms have long been underserved by the technology industry. The industry was left to depend on point solutions and contend with the constant battle to get the information they need from siloed systems.

Many businesses have had to contend with legacy Professional Services Automation (PSA) solutions built for another era. Or they try to force-fit ERP or CRM solutions to client and project management needs that seem worlds apart. Generic solutions have never lived up to the unique needs of the industry. Having to manage a morass of technologies, tools, and processes designed for yesterday's realities has led to frustration, increasing inefficiency and competitive challenges.

The Kantata Professional Services Cloud changes that. As the only solution purpose-built for the needs and realities of professional services organizations, Kantata gives organizations the tools they need to better manage project staffing resources and improve client outcomes. And with these boosts in efficiency comes increases in profitability.

By providing technology specifically designed to address the unique needs of services organizations, Kantata enables exponentially more effective operations and scaling in today's competitive professional services industry.

There are five key technical advantages the Kantata Cloud provides clients:

- 1 Platform-enabled resource optimization capabilities
- 2 Data visibility across the entire project lifecycle
- 3 Controlled and predictable project delivery
- 4 Streamlined integrations, workflows and automation
- 5 Applied industry-specific domain expertise

This paper explores the technical underpinnings and business benefits these core components deliver for today's professional services organizations.



01

A Resource Optimization Engine Designed for Today's World

The most effective use of human talent is the key to success for every professional services company. The Kantata Cloud enables a state of dynamic resource optimization, where data from across the operation ensures users can operate, adapt, and plan for resources with the fluidity and flexibility that market realities require. When you are able to manage your workforce in a truly dynamic fashion, the right person is always able to be matched to the right project at the right time. As a result, you are able to improve efficiency and quality of work for clients while enabling seamless scaling and immediate responsiveness to new or changing opportunities.

The Kantata Professional Services Cloud allows you to leverage data from across business processes to ensure users can operate, adapt, and plan with the flexibility that market realities require.

The algorithms underpinning the Kantata Cloud reflect the complex relationship between resources at every stage of the project lifecycle, across multiple projects. The Kantata Cloud considers all angles, makes recommendations with mathematical rigor and uses adjustable parameters for scenario planning and in-flight requests. This gives our users the ability to balance client, employee, and profit goals while identifying hidden margin improvement possibilities.

The Kantata Cloud makes it possible to adjust in real time to changes in supply and demand and then immediately project the impact on revenue, margins, and timelines. Users have robust resource management capabilities, including the ability to drill down into demand to pinpoint timing and improve accuracy and use what-if analysis to explore how assignments impact financials, utilization, and schedules. With this level of flexibility and perspective, the Kantata Cloud enables professional services organizations to precisely determine the ideal mix of resources for the optimal outcomes across every project, every practice area, for every client, every time.



02

Data Visibility Across the Entire Project Lifecycle

The professional services project lifecycle is complex, and when teams don't get it right, it doesn't just impact the bottom line – it also impacts client and employee satisfaction. Too often teams don't have the cross-business visibility they need to keep projects – and the business – on track.

The Kantata Professional Services Cloud's unified data model aligns business data, client project data, and workforce data.

Aligning the teams and processes that drive the project lifecycle requires what Kantata offers – a unified data model that breaks down data silos by bringing together business data, client project data, and workforce data for a more complete view of your people, plans, and projects, and the relationships between them. By providing a near real-time perspective into in-flight projects, the Kantata Cloud enables more effective

resource optimization and data-driven decision-making without the need for a single spreadsheet. From in-the-moment insights to forward-looking forecasting, the Kantata Cloud transforms data into useful, relatable dashboards and reports, surfacing relevant data that ensures business leaders understand the true state of their business.



03

Predictable Value Delivery

When service delivery is unpredictable, it disrupts value for your business and your clients. In order to drive consistent value delivery for all stakeholders across a complex portfolio of projects, professional services organizations need to optimize both planning and execution. The Kantata Cloud is purpose-built to empower professional services teams to set realistic expectations regarding delivery, while also giving project managers the insights they need to consistently meet and exceed those expectations.

With Kantata, your teams have the data they need to scope achievable project timelines and budgets. Project templates make it easy to replicate successful projects and standardize project estimation and delivery with accurate cost modeling. Clear visibility into past project performance against plan steers sales teams toward optimal proposals, ensuring there are no blind spots around which resources will be needed or what their cost rates will be.

The Kantata Cloud also enables you to build robust project plans that keep teams aligned throughout the project lifecycle. And with Kantata Pulse, which enables professional services organizations to send predefined micro surveys throughout their projects, users gain crucial insights into both employee and client sentiment. Kantata is

uniquely able to provide a real-time, holistic view of project health that accounts for both operational and experiential performance. Armed with up-to-date information on barriers to successful project delivery, decision-makers are better able to see risks before they become issues, driving proactive behaviors that keep projects from going off track.



04

Integrations, Workflows, and Automation That Drives Efficiencies

Kantata provides the first purpose-built integration platform for services organizations. By seamlessly connecting to existing in-flight solutions, the Kantata Cloud enables configurable workflows in any environment. These out-of-the-box integrations activate existing data and workflows from current solutions like Salesforce, NetSuite, Concur, and countless others to accelerate time to value. The Kantata Cloud integrates directly with a wide range of CRM, ERP, HCM, productivity, and other enterprise solutions. By extending the value of an organization's existing workflows, the Kantata Professional Services Cloud enables greater ROI across their entire tech stack.

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To streamline operations, Kantata's no-code approach enables workflow automation without the need for IT support. With a marketplace of plug-and-play tailored solutions,

the Kantata Cloud makes it easy to extend tools to build and run workflows for increased efficiencies and dynamic responsiveness. At the same time, companies can build their own features or apps to match unique business demands using Kantata's no-code app development functionality. Ultimately, this de-risks change management and enables ongoing enterprise-wide resource optimization.



05

Technology Built Upon Deep Industry Expertise

While not an innovation or programming advance, one of the factors that most differentiates the Kantata Cloud is the depth of professional services knowledge and expertise it builds upon. As a result, the Kantata Cloud directly addresses the unique needs of professional services organizations and fills major functionality gaps that plague many PSA solutions. From operational improvements that build on known best practices to tailored insights that bring together the most valuable data for services firms, the Kantata Cloud approaches functionality from the real-world needs of users.

Kantata leverages decades of domain expertise mapped to the operational realities of today's professional services organization. Using this as a foundation, the Kantata Professional Services Cloud defines clear paths for transforming financial and operational outcomes, while improving practices and processes. A path to process maturity is built in across the platform and tailored to each organization's realities. This enables the insights and continuous improvements that can only come from a purpose-built solution.



A Platform Built for the Future

The Kantata Professional Services Cloud is designed to help industry leaders break free from generic functionality and the irrelevant features of broad-reaching, outdated PSA alternatives. Kantata has helped thousands of services organizations find success and build efficiencies through insights and control previously thought unattainable. With laser focus on the innovation and outcomes-oriented approaches of the professional services sector, this SaaS solution gives people-powered businesses the power to do what they do best, even better. From the underlying foundation of applied industry expertise to the unified data model that puts people at the center, the Kantata Professional Services Cloud is a purpose-built solution delivering unparalleled value to professional services organizations.

About Kantata

Kantata takes professional services automation to a new level, giving people-powered businesses the clarity, control, and confidence they need to optimize resource planning and elevate operational performance. Our purpose-built cloud software is helping over 2,000 professional services organizations in more than 100 countries focus on and optimize their most important asset: their people. By leveraging the Kantata Professional Services Cloud, professionals gain access to the information and tools they need to win more business, ensure the right people are always available at the right time, and delight clients with project delivery and outcomes.

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