RUNNING YOUR SERVICES BUSINESS WITH NETSUITE OPENAIR PSA

1/31/2019

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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 $$$*

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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.)

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Professional Services Automaton 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

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What is OpenAir?

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.

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OpenAir

- Stand alone or Integrated Project Management, Resource Management, Project Accounting and Time & Expenses Solution

- Founded in 1998 & Acquired by NetSuite in 2008

- Acquired by Oracle in November 2016

- +2,600 Global Customers

- **Growing by 30%+ in each of the last 14 consecutive quarters!!!**

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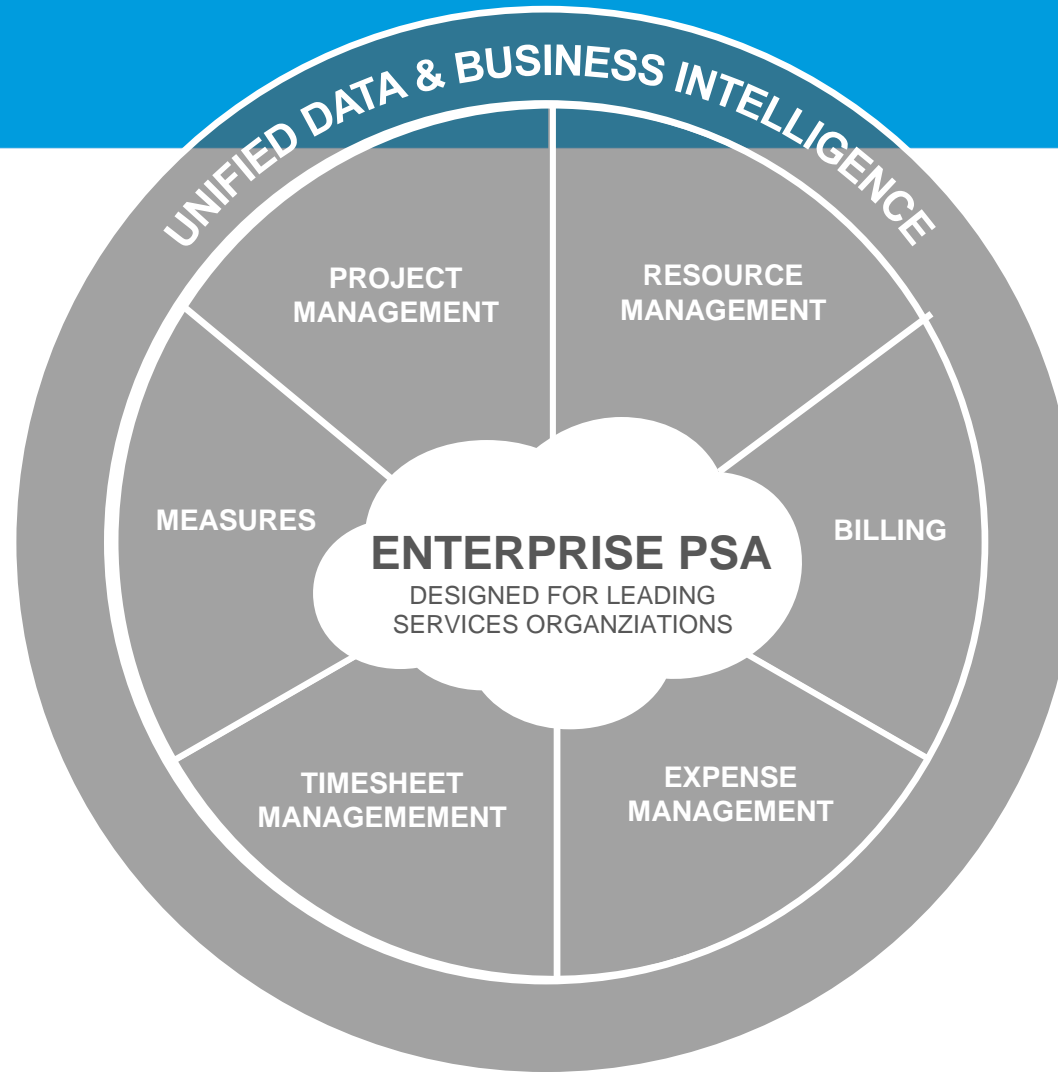
OPENAIR

The Industry Leader in Professional Services Automation

NETSUITE OPENAIR 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

#1 IN CLOUD SERVICES AUTOMATION

$34B
SERVICES REVENUES MANAGED

OVER

2,500
LIVE CUSTOMERS

WorkDay

FinancialForce

- OPENAIR has 10X more PSA deployments than FinancialForce + WorkDay combined!

* 2,600+ customers represent more than 2,600 organizations and subsidiaries globally

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BEST IN CLASS BUSINESS VISIBILITY IS A MUST

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Real-time Visibility	Eliminate making decisions based on out-of-date data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

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BUSINESS INTELLIGENCE FOR ALL

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

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ROLE BASED VIEW
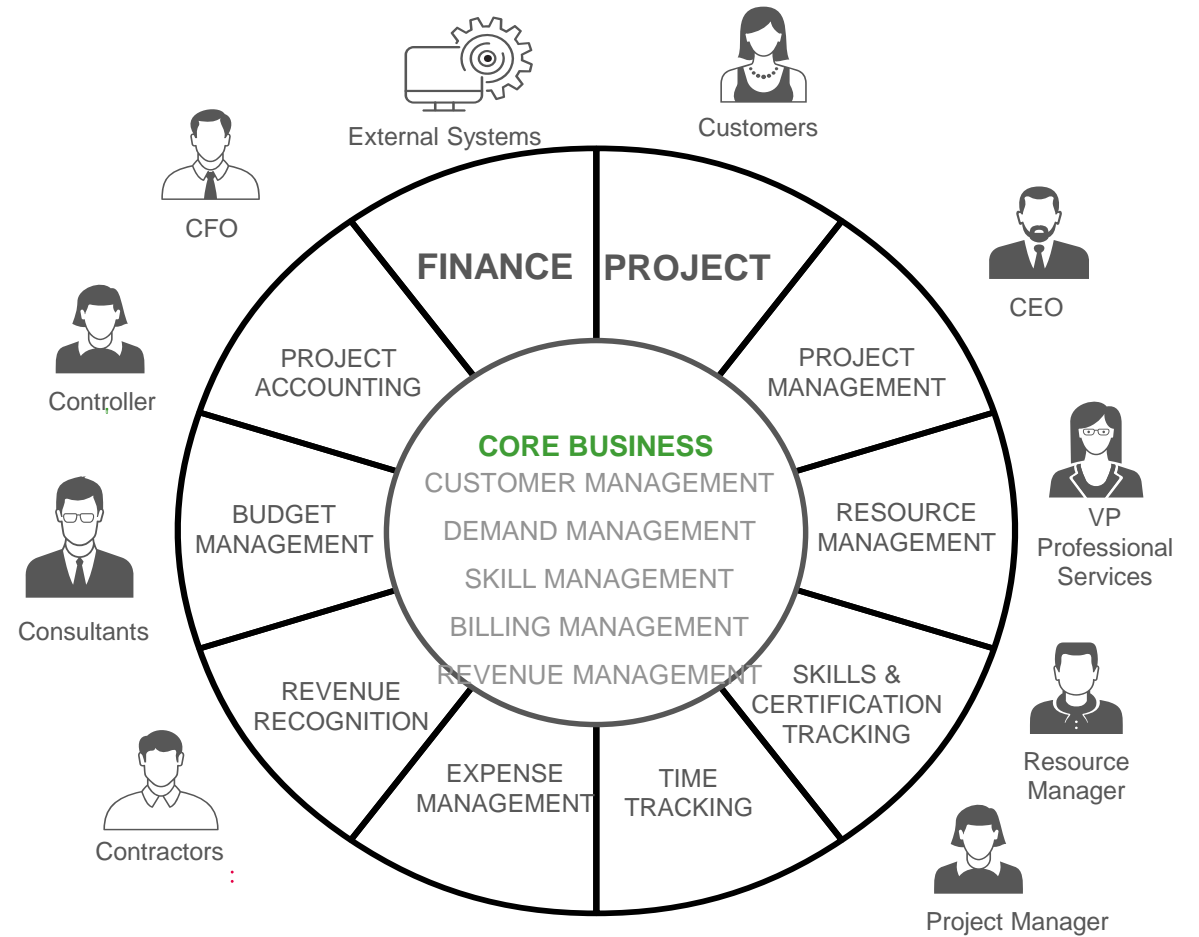
EASE OF USE / USER EXPERIENCE

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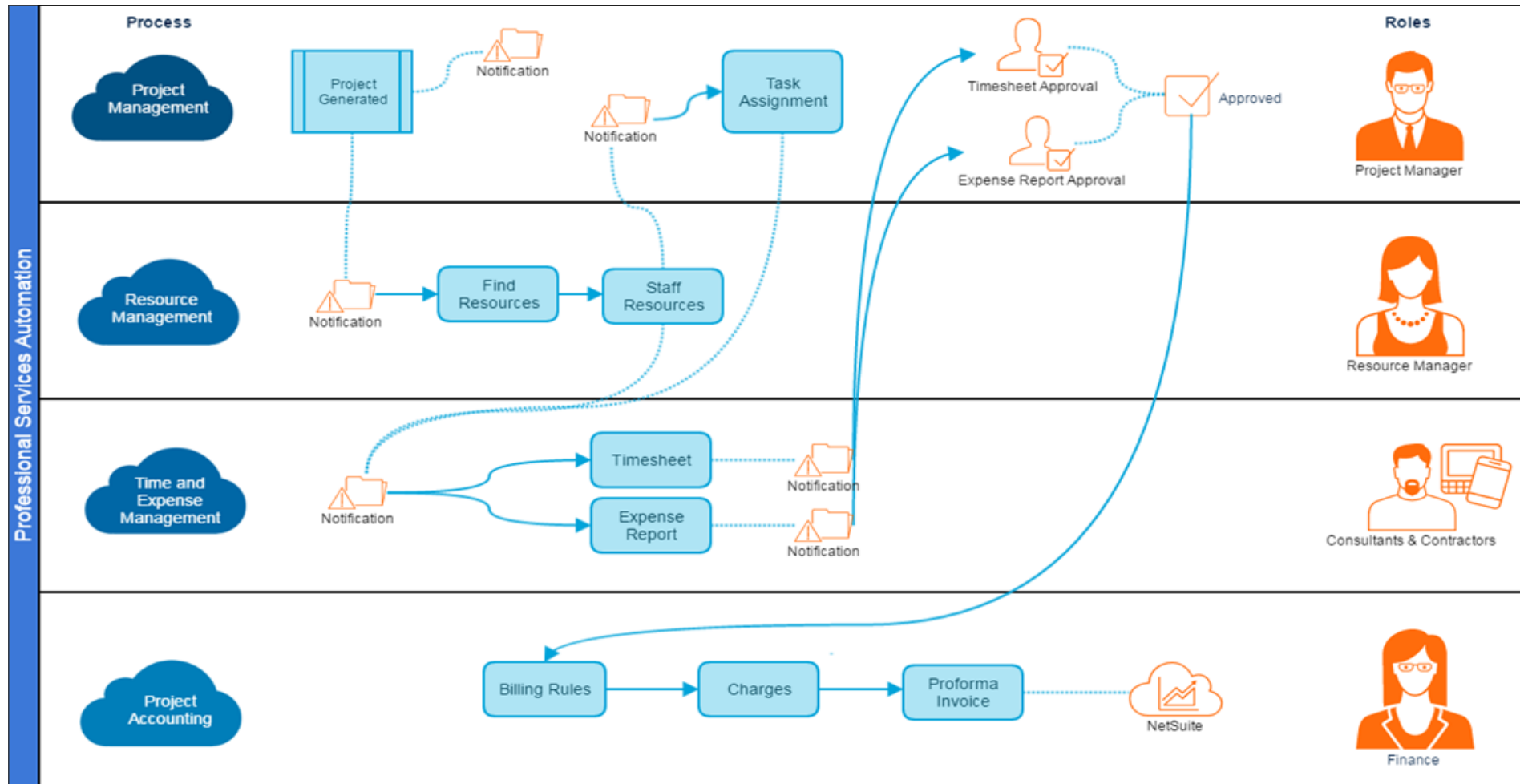
OPENAIR: HISTORY OF INNOVATION

Project Status Report
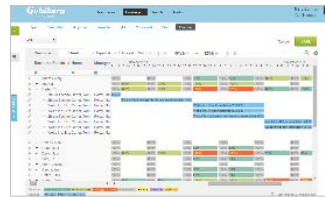
Resource Booking Planner
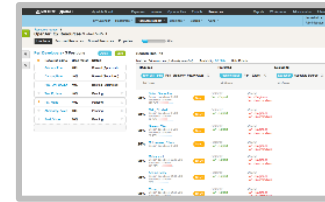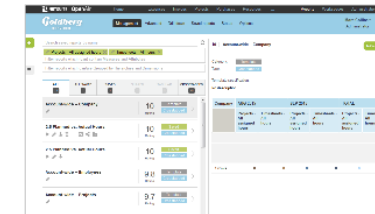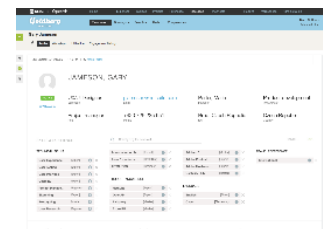
Resource Demand Request
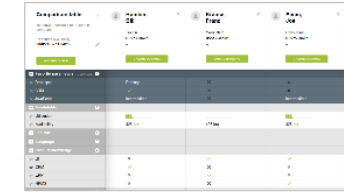
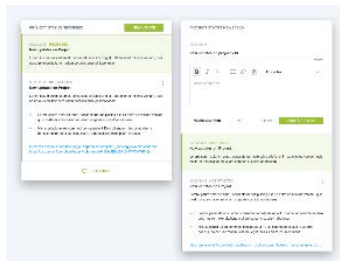Side-by-Side Compare
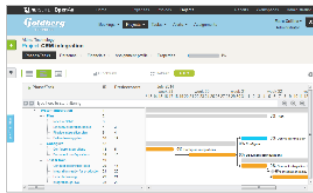
Interactive Gantt
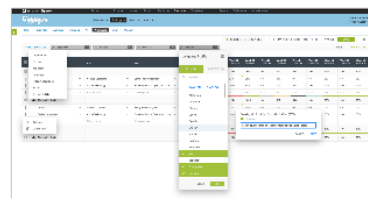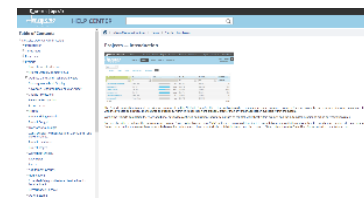
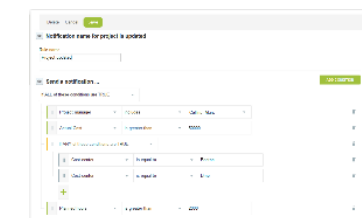Advanced Booking Planner
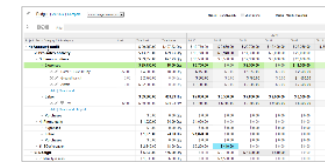
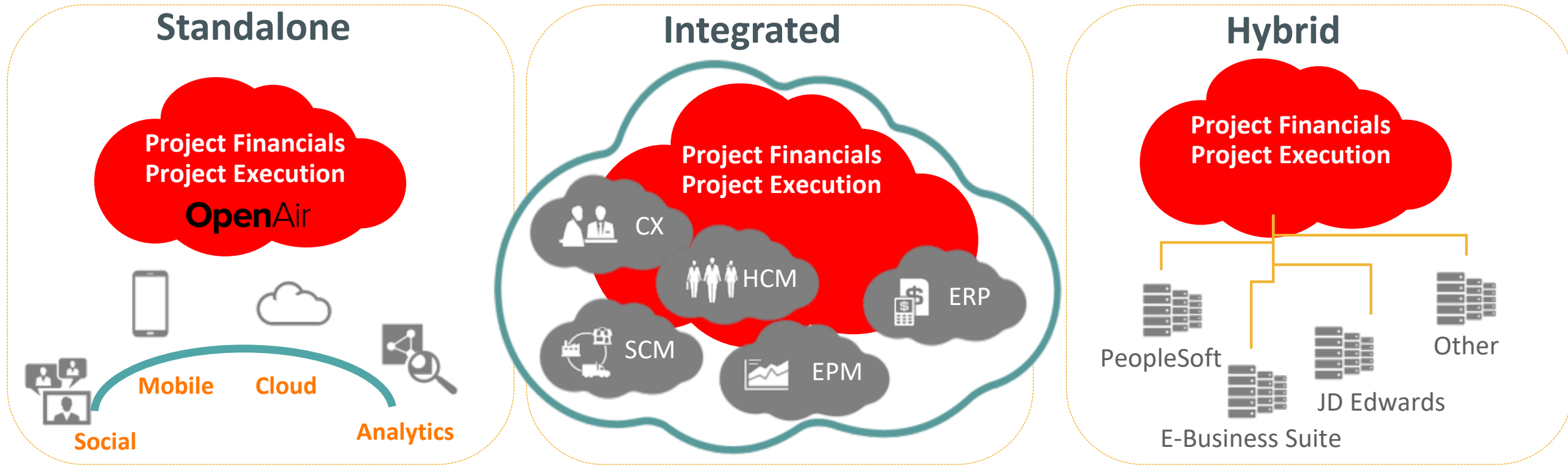Advanced Budgeting

New Reporting Suite

User Profile

Project Newsfeed

Help Center

Notification Builder

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ORACLE OPENAIR PSA CLOUD JOURNEY

Standalone

Project Financials
Project Execution

OpenAir

Social   Mobile   Cloud   Analytics

Integrated

Project Financials
Project Execution

CX
HCM
ERP
SCM
EPM

Hybrid

Project Financials
Project Execution

PeopleSoft
E-Business Suite
JD Edwards
Other

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CUSTOMIZATION IS NOT A DIRTY WORD-

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

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SECURE AND RELIABLE

99.95%

Actual Performance in 2017

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

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KEY METRICS

24%
More Revenue per Employee

Percentage of Projects Delivered On-time **13%**

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

Advantage of a *Best-in-Class PSA Solution

Increase of Employees that are Billable **13%**

Billable Utilization increased by **7%**

43%
More Project Margin for T&M Projects

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MICROVERTICALS

| SOFTWARE & HI-TECH | MANAGEMENT CONSULTING | IT SECURITY | HEALTHCARE CONSULTING | SCIENTIFIC CONSULTING |

LIVE DEMO

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THANK YOU FOR YOUR TIME AND ATTENTION

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QUESTIONS AND ANSWERS

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