

Kantata SX

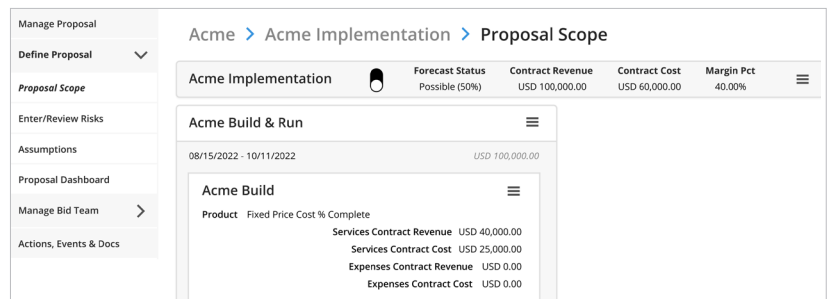
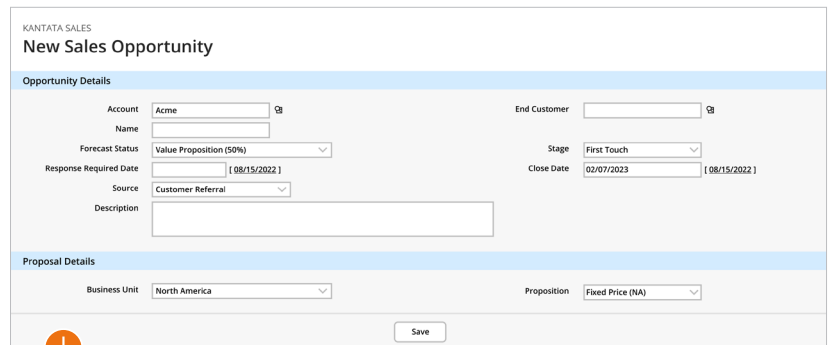
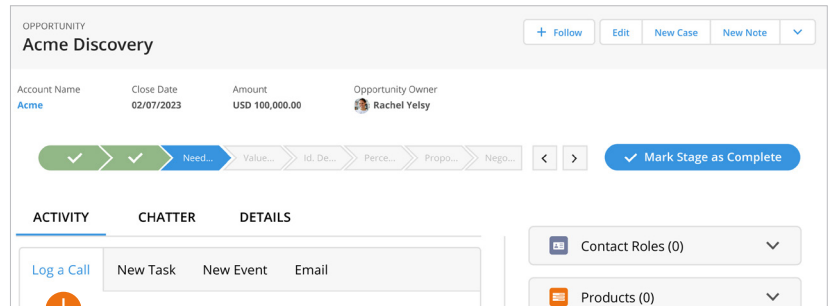
Kantata develops vertical SaaS technology, purpose-built for the highly specific and complex needs of professional services organizations, with a comprehensive suite of market-leading capabilities that deliver clarity, control and confidence at every step of the professional services project lifecycle.

Kantata SX, built on the Salesforce Platform and embedded within Sales Cloud (Salesforce CRM), offers category-leading capabilities while connecting account data from sales to delivery. It seamlessly integrates with other Salesforce-native solutions as well as third-party tools supporting your organization's delivery model and continued growth.

KANTATASM

Project Estimation – Accurately scope new engagements and set your delivery teams up for success.

- Protect your margins by forecasting and modeling potential projects directly against your sales opportunities with **Proposal Modeler**.
- Leverage easy-to-create commercial templates to build new proposals or generate proposals by integrating with Salesforce CPQ.
- Built-in **Team Profiler** sets delivery teams up for success by helping sales accurately scope proposals based on projected resource availability.
- Automatically create engagements to simplify the handoff between sales and delivery teams.



Resource Management – Ensure you have the right people on the right projects across your business.

- Optimize resource management globally within a single screen, seamlessly connected with your Salesforce CRM.
- Gain unbound visibility into your global pool of resources to meet demand with the **Availability Manager**.
- Additional tools like **Weighted Skills Matcher** help resource managers make informed decisions and choose the right resources for every project.

Required Capabilities				
	Min Rating	Mandatory	Peter Gibbons	Target Rating
IT SKILLS > progr-lang > progr-lang				
JavaScript	5	<input checked="" type="checkbox"/>	4	4
Java	5	<input checked="" type="checkbox"/>	4	4
Python	2	<input type="checkbox"/>	3	3
Ruby	3	<input type="checkbox"/>	3	None
IT SKILLS > networking > networking				
McAfee Total Protection	2	<input type="checkbox"/>	2	2
McAfee VirusScan	2	<input type="checkbox"/>	2	2
Risk Mitigation	4	<input checked="" type="checkbox"/>	3	3
Technical Writing	4	<input checked="" type="checkbox"/>	4	4

Dashboard

Kantata Resource Dashboard

As of 10 Nov 2020, 13 56 Viewing as Chris Newland

Available Capacity by Grade

View Report (KRES16 Resource Capacity by Grade)

Activity Demand by Role

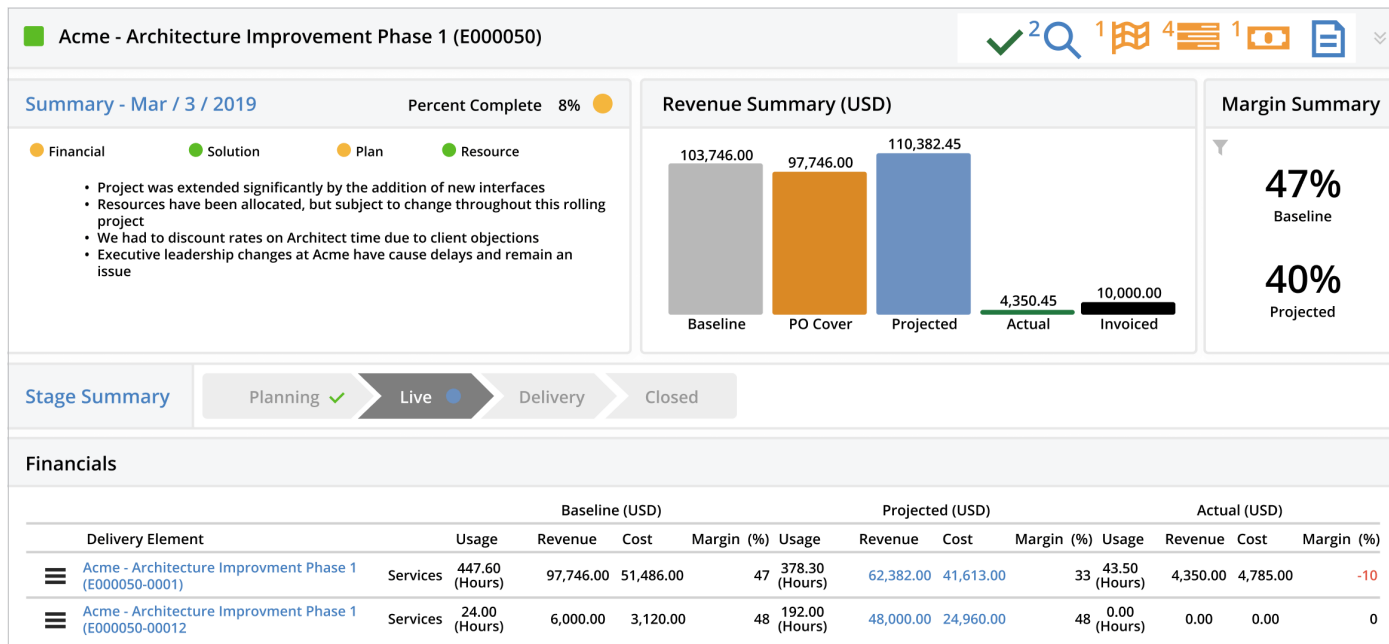
View Report (KRES09 Resource Demand by Activity Role)

Headcount by Business Unit

View Report (KRES06 Headcount by Business Unit)

Capability Detail Report

View Report (KRES02 Capability Detail Report)



Project Management – Keep your projects on track and deliver bottom-line benefits.

- **Engagement Dashboard** keeps you up-to-date with context sensitive insights that help prioritize the most important tasks.
- **Milestone Manager** helps track both billing and reporting milestones and includes embedded workflow and email approvals.
- **Task Manager** supports planning at the task-level for complex projects for both waterfall or agile delivery models.
- Ensure you capture accurate time and expense data across the project lifecycle with **Predictive Timesheets** driven by geolocation and mobile features.

Team Collaboration – Connect people, resources and conversations across projects to improve outcomes.

- Embedded, followable **Feeds** support collaboration amongst teams to ensure delivery teams are up-to-date and increase visibility into project milestones.
- Drive client engagement by collaborating and sharing key project information using the **Community**.

Financial Management – Boost profitability, strengthen margins and enable real-time financial oversight.

- Empower managers to make more informed decisions across all phases of an engagement with real-time visibility into financial metrics such as margin against actuals, estimates to complete, budget and more.
- **Financial Period Manager** streamlines and improves the accuracy of month-end reporting processes by automatically identifying changes impacting revenue recognition.
- Support your complex global organization with location taxation features, multi-language and currency support and intercompany accounting capabilities.

Business Intelligence – Bring together all your data and insights for smarter decision-making.

- A collection of other out-of-the-box and customizable reports supply engagement data to sales, resourcing, delivery and finance to help your entire organization make more informed decisions proactively.
- Standard **Finance Dashboards** and configurable finance reports ensure you have an accurate view of company, departmental and project financial performance.



Integrations and Workflows –

Empower your teams by connecting existing systems to extend tech investments.

- Easily enable on-platform integrations like Salesforce CPQ or connect third-party tools through synchronous APIs.
- Connect your suppliers with ongoing engagements with the **Supplier Portal API**.



Future-proof your operations with the leading provider of purpose-built professional services software solutions. Visit [Kantata.com](https://www.kantata.com) to learn more or schedule a demo today.