Today's Speaker

Eric Demers

Senior Solution Consultant

Housekeeping

To submit a question:

Raise Hand

Type in your question here

Click Send

Agenda

Objective: Bring success to your customers from the beginning of the engagement

- Importance of a process to transition from Sales to Delivery

- Benefits of a smoother process

- Demo of out-of-the-box integrations

- Continuing the interaction throughout the project lifecycle

The Professional Services Racetrack
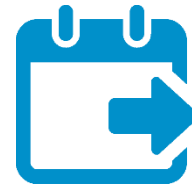
Our Mission: To revolutionize the way organizations plan, manage and execute projects & work

Publicly Traded on the **NASDAQ**

Ticker: UPLD

1,200+ Enterprise Customers with

300,000+ Active Users in

50+ Countries

Tenrox is the Professional Services Automation Solution in the Upland Family

The Upland advantage: Getting the best of both worlds

Secure · Scalable · 360° Service · Integrations

One Enterprise-Class Partner

Many Built-for-Purpose Products

Tenrox by upland
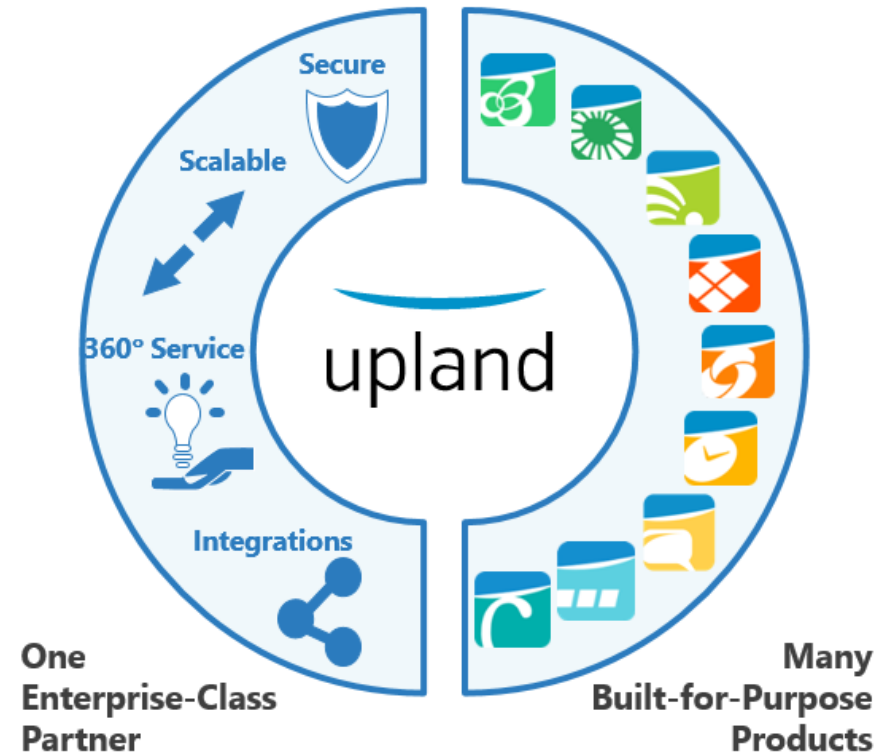
The Upland Family of Cloud-Based Products

Built-for-purpose tools to suit your needs – delivered by a single, enterprise-class software company

|	Category	What it Does
ComSci by upland	IT Financial Management	Run IT as a business – with transparency, visibility & control
PowerSteering by upland	Project Portfolio Management	Improve business results through top-down strategic planning and portfolio alignment.
EclipsePPM by upland	Project Portfolio Management	Drive project & resource performance through simplified, out-of-box PPM
EPMLive by upland	Project Portfolio Management	Improve results through bottom-up, execution-focused project management and collaboration.
Tenrox by upland	Professional Services Automation	Streamline service delivery & resource management
Timesheet by upland	Time & Expense Management	Automate project time tracking & client billing
FileBound by upland	Document & Workflow Automation	Improve efficiency with end-to-end content & process automation
Clickability by upland	Web Content Management	Boost brand awareness, increase engagement & drive conversions
MobileCommons by upland	Mobile Engagement Management	Drive and manage digital engagement through two-way SMS campaigns

Tenrox Professional Services Automation
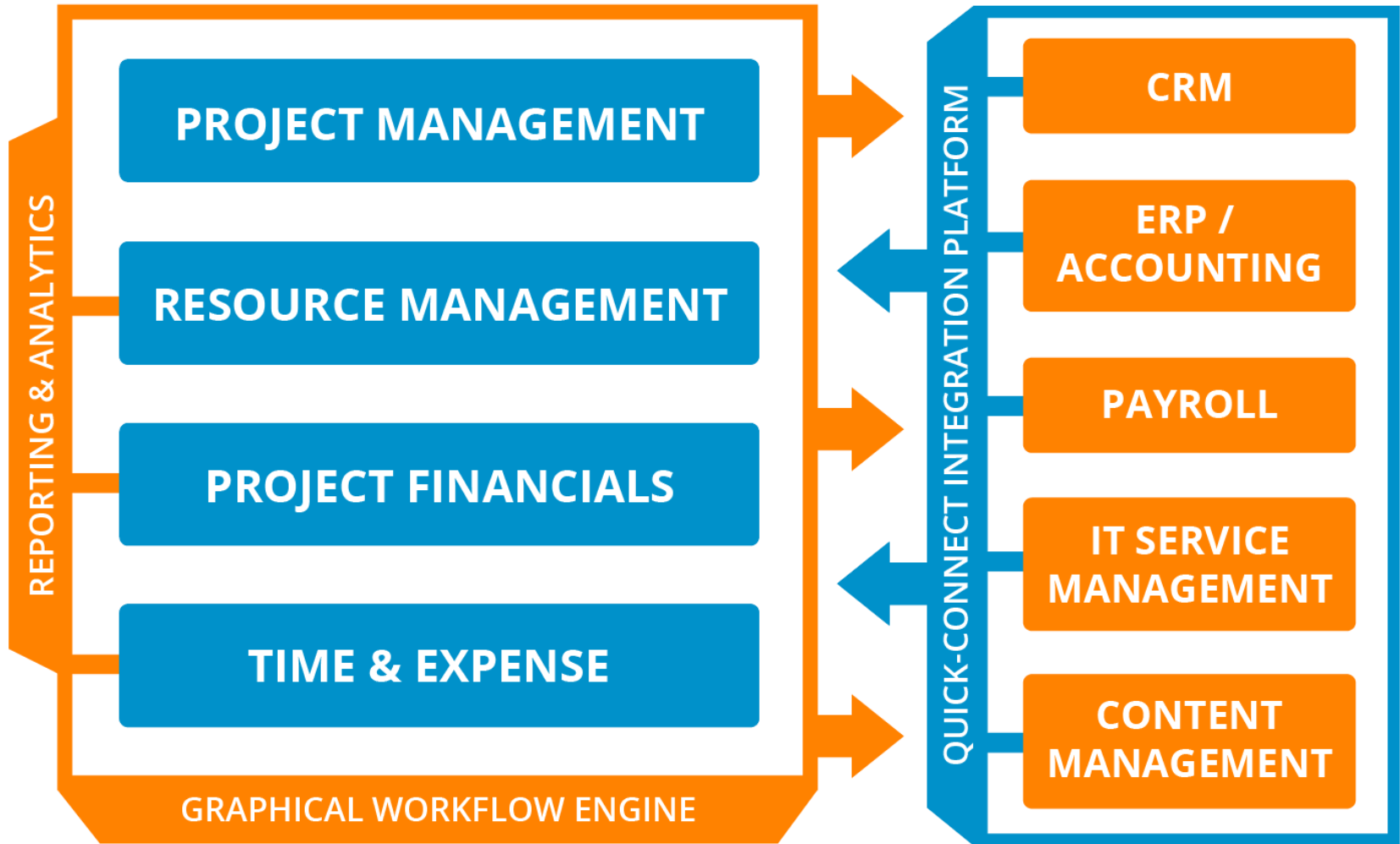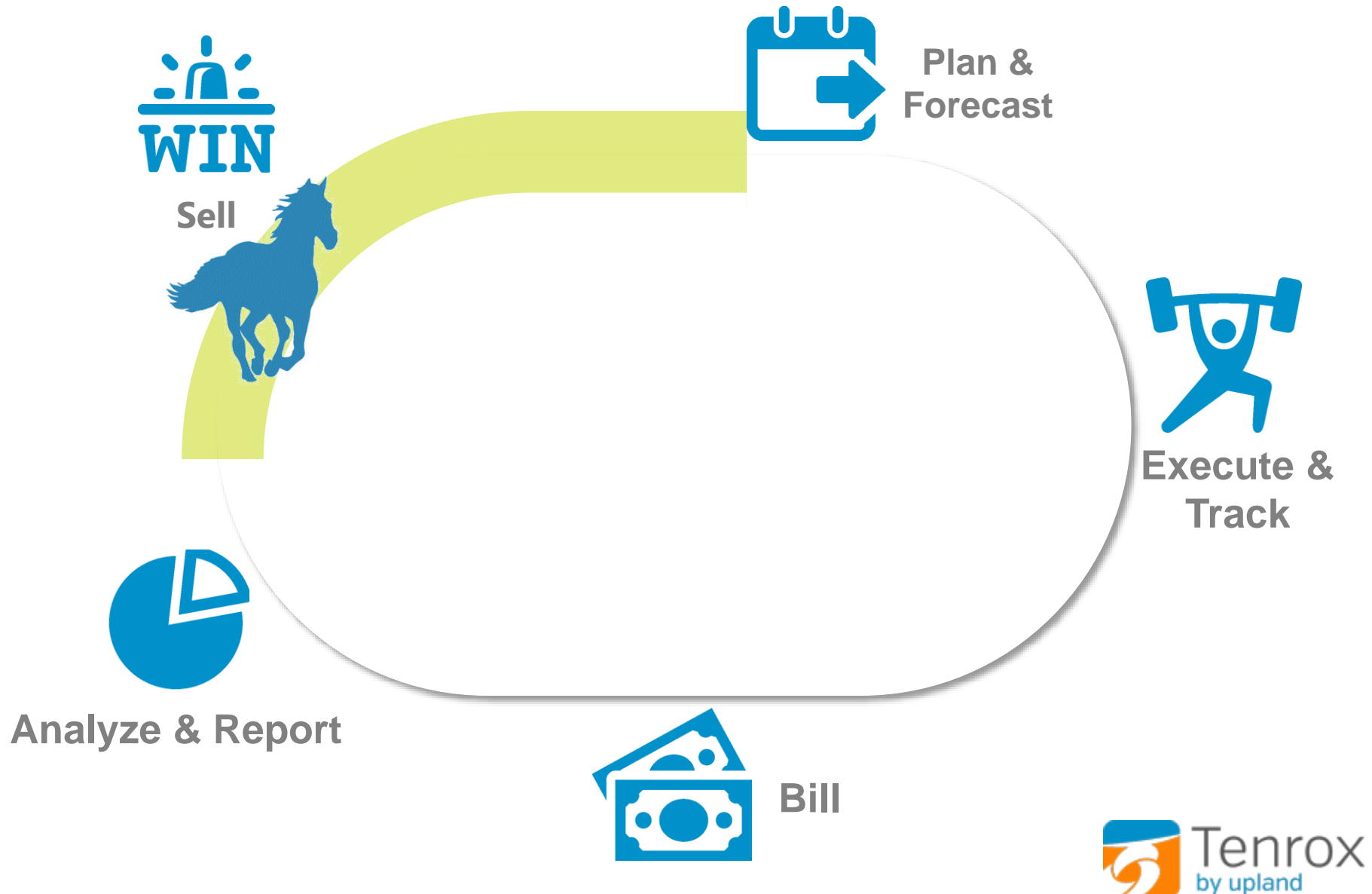
Let's Place Our Bets
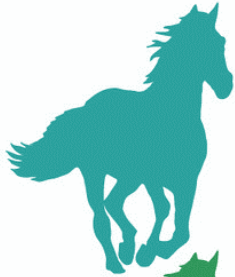
Time Saver

Less Errors

Pipeline Visibility

Quick Billing

Tenrox
by upland
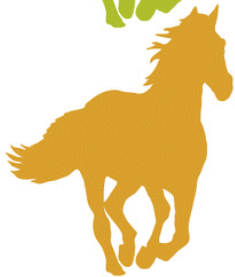
Demo

SFDC Integration

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by upland

https://na17.salesforce.com/006o0000002wnsE

Search...   Search

Steve Masters ▼   Setup   Help   **Sales** ▼

Home   Leads   Accounts   **Opportunities**   Cases   Reports   Dashboards   Projects   Chatter   +

Create New... ▼

Recent Items
- Burlington Textiles Weaving Plant Generator
- A Project
- Burlington Textiles Corp of America
- Steve Masters

🗑 **Recycle Bin**

Opportunity
Burlington Textiles Weaving Plant Generator

Customize Page | Edit Layout | Printable View | Help for this Page ❓

⚡ Show Feed   Click to add topics ℹ️

Products [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Contact Roles [0] | Partners [0] | Competitors [0] | Stage History [5]

Opportunity Detail   Edit Delete Clone Open/Publish Project

Opportunity Owner	😊 Steve Masters [Change]	Amount	$235,000.00
Private	☐	Expected Revenue	$176,250.00
Opportunity Name	Burlington Textiles Weaving Plant Generator	Close Date	28/07/2014
Account Name	Burlington Textiles Corp of America	Next Step	
Type	New Customer	Stage	Proposal/Price Quote
Lead Source	Web	Probability (%)	75%
		Primary Campaign Source	

▼ **Tenrox KPIs**

Budgeted Time (hrs)	1,000	Actual Time (hrs)	232.00
% Complete	23%	Billed Amount (USD)	$74,500.00

Tenrox Enterprise Portal - Masters, Steve - Google Chrome

🔒 https://scdemo2014r2sfqb.tenrox.net/Tenterprise/Core/Base/MainFrame2.aspx?r=0.0775182475696869&DotNet=1&pageKey=cd21cfa4bbb8f7a...

upland Tenrox   ❓ 👤 Masters, Steve - Project Manager

Work > Project Edit: Burlington Textiles Weaving Plant Generator

General | Options | Tasks | Milestone | Work Plan | Project Team

Back | Save | Summary | Calendar | Documents | Notes | History | CRM Import Status | Request(Creator) | Execute(Creator)

|			
Tracking #:	STDPRJ-000018 (Draft)		
Name:	Burlington Textiles Weaving Plant Generator		*
Id:	006o0000002wnsEAAQ	Project Code:	006o0000002wnsEAAQ *
Client:	Burlington Textiles Corp of America ... *	Portfolio:	Internal ... *
Manager:	Admin, Matt ...	Alternate manager:	...

Integration & Automation: Tactical Benefits
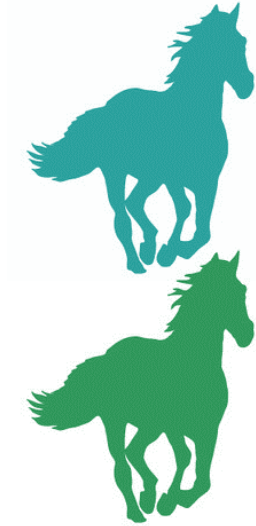
Time Saver

First Place at Automation Derby

Less Errors

Photo Finish at the Integration Cup

As a manager of services delivery...

# Poll: How much visibility do you have into upcoming engagements?

Tenrox by upland

Demo

Dynamics CRM Integration

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by upland

Common

ACTIVITIES

DOCUMENTS

CONNECTIONS

AUDIT HISTORY

PROJECTS

| ✓ Qualify | Develop (Active) | Propose | Close | ← → Next Stage |

Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter
Identify Stakeholders	mark complete

Project Associated View ⌄

Search for records

+ ADD NEW PROJECT　　**ADD EXISTING PROJECT**　　**BULK DELETE**　　**CHART PANE ⌄**　　**RUN REPORT ⌄**　　**...**

✓	Name ↑	Owner	Project Status
	MyContoso Intranet	Eric Demers	Estimate

1 - 1 of 1

Page 1 ▶

All | # | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Open

Demo

Workflow and Resource Planning

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Ashton, Mark - Director of Services + Admin

General | States | Transitions | Assignments

Back | Save | Setup | Security | Rules

Name: Standard Project *

Id:

Alias:

☐ Is a placeholder

☐ Suspended

Description:

States: 7
Transitions: 12
Sinks: 0
Shadows: 0
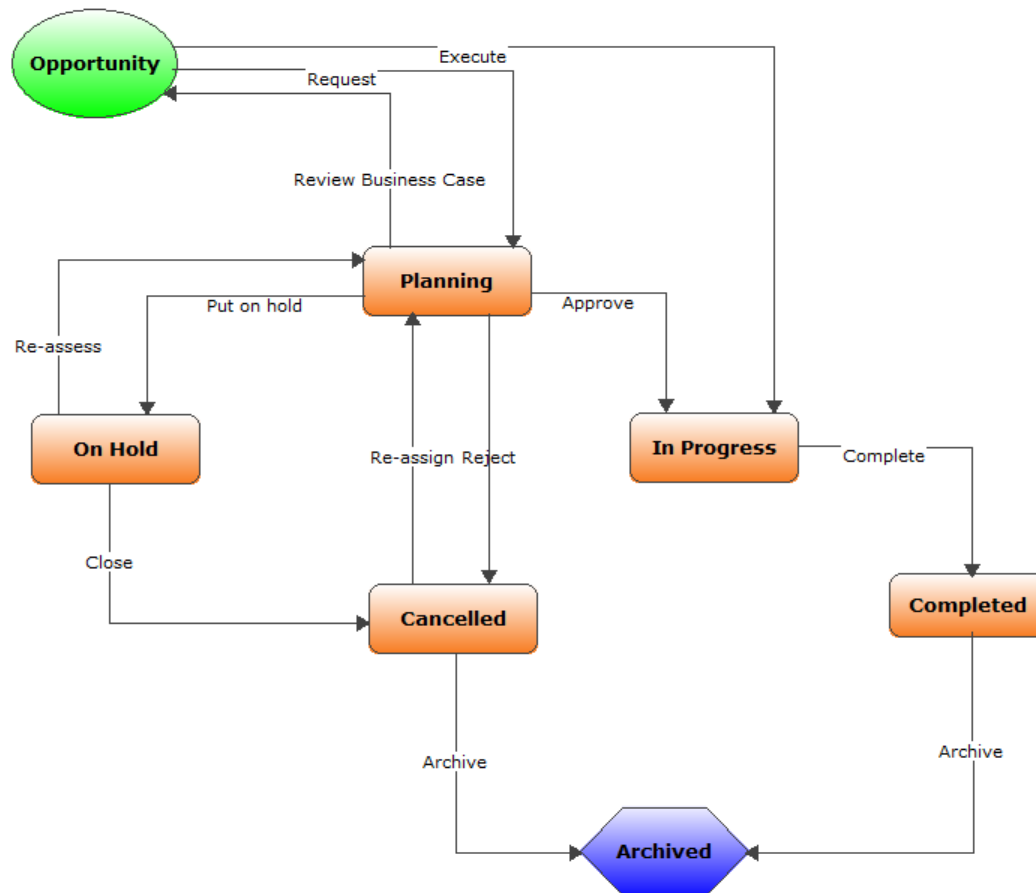
Better Utilization: Tangible Results

Assuming

| 250 consultants | $1,500 /day | 80% utilization | 3% cost of capital |

10% misforecast → **Opportunity Cost**

$180,000 /year

+ customer satisfaction

Pipeline Visibility: Strategic Benefits
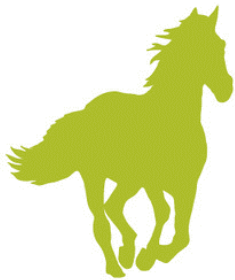
Pipeline Visibility

Winner of Utilization Stakes

Demo

Sales-to-Delivery Report

Tenrox
by upland

Quicker Delivery: Tangible Results

Assuming

| 250 consultants | $1,500 /day | 80% utilization | 3% cost of capital |

Benefits

1 week improvement in time-to-delivery → $42,000 /year

+ customer satisfaction
+ project success

Quicker Billing: Impact on Bottom Line
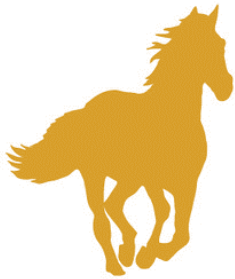
Quick Billing

Triple Crown Champion

Thoroughbred Winners

Time Saver

First Place at Automation Derby

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Winner of Utilization Stakes
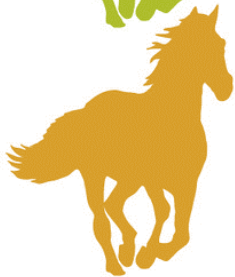
Quick Billing

Triple Crown Champion

Tenrox
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What's in it for the Sales team?

Status Reporting in Tenrox PSA

Status Update

Project Name: Corporate Expense Tracking
Client: Best Buy Co. Inc.   Project ID:
Project Start: 01/02/2012   Project End: Open Ended

Project Manager
Ashton, Mark

Team Members

Adams, Jay

Allan, Barbara

Allen, Albert

+38 more

Current Time Budget	Actual Time
70100:00	17725:15
Current Billable Budget	**Actual Billable**
$ 12,915,000.00	$ 3,666,295.84

Update Period 10/19/2015 🗓   Health ◇ ⌄

☑ Progress Reviewed with project team
☑ Project Expenses are Posted
☑ Forecasts Updated

Tenrox
by upland

Demo

CRM KPIs

🔒 https://na17.salesforce.com/006o0000002wnsE

salesforce

Search...   Search

Steve Masters ▾   Setup   Help   **Sales** ▾

Create New... ▾

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▶ **Additional Information**

[Edit] [Delete] [Clone] [Open/Publish Project]

Products   [Add Product] [Choose Price Book] [Sort]   Products Help ❓

No records to display

Open Activities   [New Task] [New Event]   Open Activities Help ❓

No records to display

Activity History   [Log a Call] [Mail Merge] [Send an Email]   Act

💬 Chat ⟩

Summary

- **Tenrox PSA helps you streamline the process of transitioning from Sales to Delivery**

- **Reduce errors**

- **Save time**

- **Improve utilization**

- **Bill quicker**

- **Set targets and measure all of the above to improve the process on a continuous basis**

Contact Us:

- ✓ **Phone:**
  - – Direct: 450-688-3444
  - – Toll free (US and Canada): 855-944-PLAN (7526)

- ✓ **Email: info@uplandsoftware.com**

- ✓ **Website: www.tenrox.com**

- ✓ **Connect with us:**
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  - Company: Tenrox

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