



# Professional Services Innovation

Win more quicker, manage for profit, and deliver excellence.



## PROPOSAL AUTOMATION

Create winning sales proposals and be more responsive to customer requests with proposal automation and customer reference management.



## RESOURCE OPTIMIZATION

Proactively manage your capacity and project demand and gain visibility into allocations and financial forecasts to ensure optimal resource utilization and project profitability.



## PROJECT MANAGEMENT

Plan, launch and track project progress for on-time, on budget delivery, and help ensure project success, profitability and maximum cash flow.



## FINANCIAL MANAGEMENT

Manage project budgets in real time to reduce revenue leakage, accelerate customer billing, maximize cash flow, and ensure overall project success.



## KNOWLEDGE MANAGEMENT

Deliver knowledge into the hands of your employees to encourage collaboration, keep projects on track, and ensure resources and projects are aligned with corporate governance requirements.



## CUSTOMER EXPERIENCE

Create a feedback loop to engage, capture, process, present, and act on customer and employee sentiment to drive meaningful change. Automate the collection and development of references.



## STRATEGIC INSIGHTS

Gather insights into project and business performance with interactive dashboards that provide real-time data to monitor trends, identify gaps, and make decisions before impacts to the bottom line.

Upland's Professional Services Automation (PSA) solution suite transforms services delivery from sales proposal to project success—the only knowledge-enabled platform that augments services automation with sales enablement and customer experience management, including proposal automation, customer reference management, voice of the customer, and insights-driven business intelligence.

## Modernize Your Services Organization with an Innovative PSA Platform

Excelling in a dynamic and competitive professional services market means streamlined sales execution, flawless project delivery, and deep customer engagement. Upland's Professional Services Automation platform is the only PSA solution that combines the best of proposal automation, resource and project management, knowledge management, collaboration, customer sentiment and reference management, and built-in business intelligence.

## Upland's Professional Services Automation Solutions

### Services Automation Solutions

#### Timesheets and Expenses

Reduce revenue leakage and accelerate invoicing with centralized timesheets and expense management. Capture and track time and expenses from anywhere. Accelerate approvals via a highly configurable workflow engine. Connect to third-party systems to increase billing accuracy.

## Resource Management

Services organizations that can efficiently manage and optimize their people according to skills, availability, and utilization will experience a positive impact on project delivery face an increase in profitability, and higher customer satisfaction.

## Project Management

Plan, track, and deliver billable projects with powerful cloud-based project management software. Automate project creation, centralize all aspects of planning and execution, and gain up-to-date timelines on project status, tasks, budgets, and forecasts to keep your projects on target for delivery.

## Project Financials

Gain 360-degree insight into the financial health of your services organization's project financial management. Forecast revenue pipeline, monitor cash flow, align budgets to delivery and build a predictable model for success.

## Services Transformation Solutions

### Proposal Automation

By automating proposal management, services organizations will experience superior alignment between sales and delivery teams, including an increased ability to respond to RFPs and SOWs, consistent repeatable proposals, and greater consistency between execution and delivery.

### Knowledge Management

A PSA solution that delivers knowledge into the hands of your employees gives them the information they need to encourage collaboration, keep projects on track for on-time, on-budget delivery with the highest quality, while ensuring resources and projects are aligned with requirements.

### Customer Reference Management

Services organizations with deep customer engagement experience greater retention and loyalty, while opening up opportunity for new customer acquisition. Customer reference management activates the process and accelerates new deals to grow your business.

### Voice of the Customer and Employee Surveys

Create a feedback loop to engage, capture, process, present, and act on customer and employee sentiment to drive meaningful change for greater project success.

Ignite your business with  
Professional Services  
Automation Software

24% greater profit margins

Driving real change  
for companies like



For more information on Upland Software enterprise solution suites visit [www.uplandsoftware.com](http://www.uplandsoftware.com).

## About Upland Software

*Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.*