About Grass Valley

The leading technology provider in broadcast and media
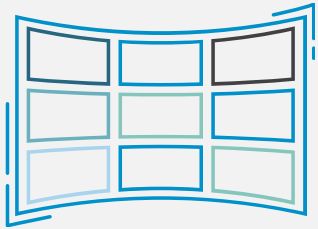
Monitor Wall

Camera's

Editing

Replay

"Vision Mixer"
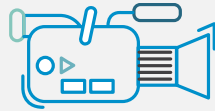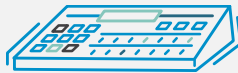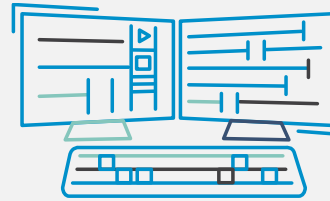
News Scripts & Rundown

Multi-Channel Automated Distribution

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Grass Valley's Journey to Maturity

Disconnected	**Automated**	**Connected**	**Innovative**
2015	2016	2018	2019-2020
Standalone processes and systems. Tactical services delivery with no demonstrable revenue KPIs	Automate repeatable business practices and create efficient services operations.	Connect front office pipeline and back office financials to create a holistic services organization.	Analyze business performance, forecast resource requirements and develop forward-looking strategies to help ensure predicable profitability.

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Where Our Journey Began

Grass Valley lacked a unified platform for their Services & Support Team

320

global service resources

3

ERP Systems

Multiple

PS tools

Transformation 1.0
Automated & Connected

Flexible IT Integration

Putting Upland PSA at the heart of our professional services business

Initialized the Project

+ Capture line items from the sales order
+ Forecast the workplan
+ Revenue forecasting

Deliver the Workplan

+ Build the workplan
+ Global resource planning
+ Assign resources to tasks
+ Capture timesheets and expenses
+ Project Lifecycle Management

Create Revenue

+ Automated billing
+ Financial reporting
+ Revenue recognition

PSA Reporting & Analytics

Tangible & actionable insights

Utilization Reporting

Customer Support
Services Delivery

Work Plan Reporting

Customer Support
Field Service Delivery
Solutions Delivery
Revenue Forecasting

Time + Expense Budget Reporting

Customer Projects
Internal Projects
Profitability
On Time Delivery

Project Reporting

Order Intake
Order Backlog
Key Performance Indicators
Customer Satisfaction
Process Compliance

Resource Performance

Customer Support
Services Delivery

Invoice + ERP Reporting

Draft Invoicing
Invoice Reconciliation
Services Backlog

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Transformation 1.0 – End State

From cost-center to value driver

- **Better customer engagement**

  - **Increased** ability to deliver on time and within budget

  - **Ability** to measure business performance in combination with continuous improvements

  - **Accurate** and timely billing

- **Upland partnership model**

  - **Flexible** IT integration

  - **Understanding** our goals

  - **Ongoing** engagement model
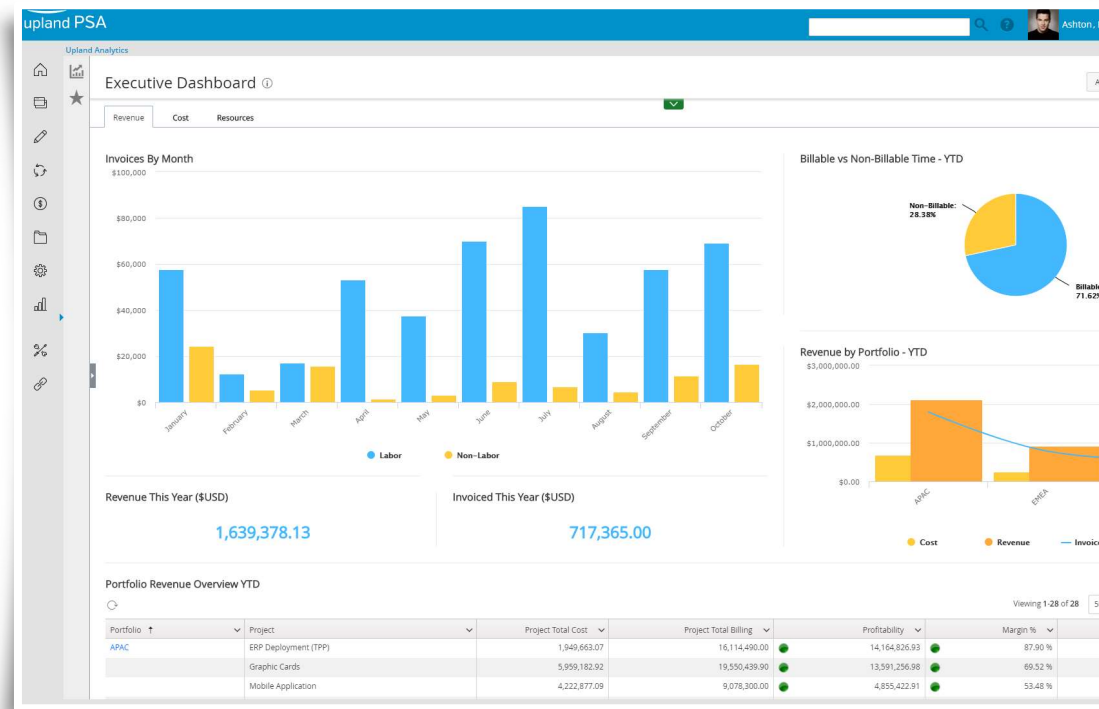
Why Does Efficient Resource Management Matter?

(Hint: it's all about customer success!)

Speed	Optimization	Risk
Real time, responsive and transparent information	Match tasks with the resources that have the right skills	Lower the risk of overcommitting your resources

Increase your ability to deliver on time
and allow your customers to start getting ROI

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Transformation 2.0
Maturity, Innovation
& Customer Success!!

Knowledge Management

Build & share knowledge through KCS

- **KCS certified for our customer support teams**
  - Self-service
  - 1000s of knowledge articles
- **We want to apply this to our services team**
  - Enable teams to keep projects on track, on time and on budget with the highest quality
  - Project standardization
  - Repeatability
  - Seamlessly integrated into our PSA system
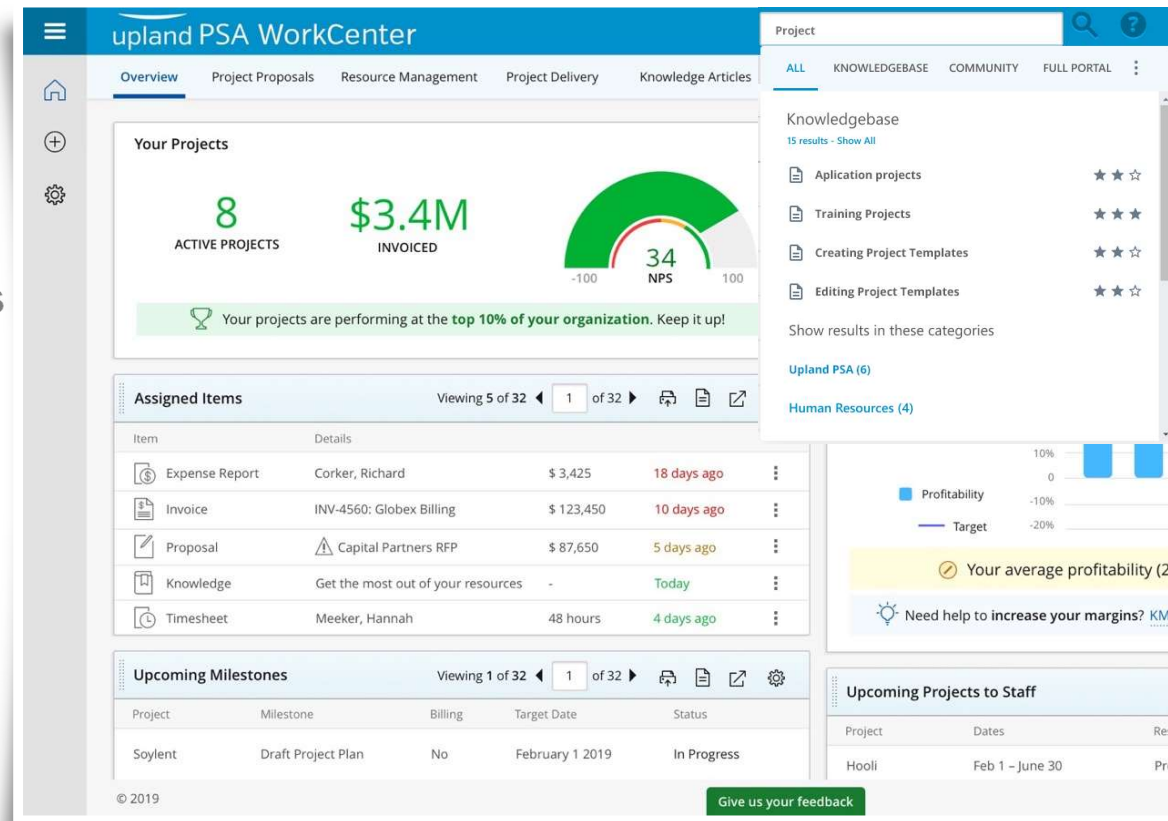
Customer Feedback & Sentiment

Acquiring customers is expensive – keeping them is a MUST

- We do NPS surveys with our customers

- We want to measure customer experience and business performance
  - At the project level
  - Automated at project milestones
  - Take action and course correct on an ongoing basis
  - Move beyond Surveys;augment with customer sentiment analysis
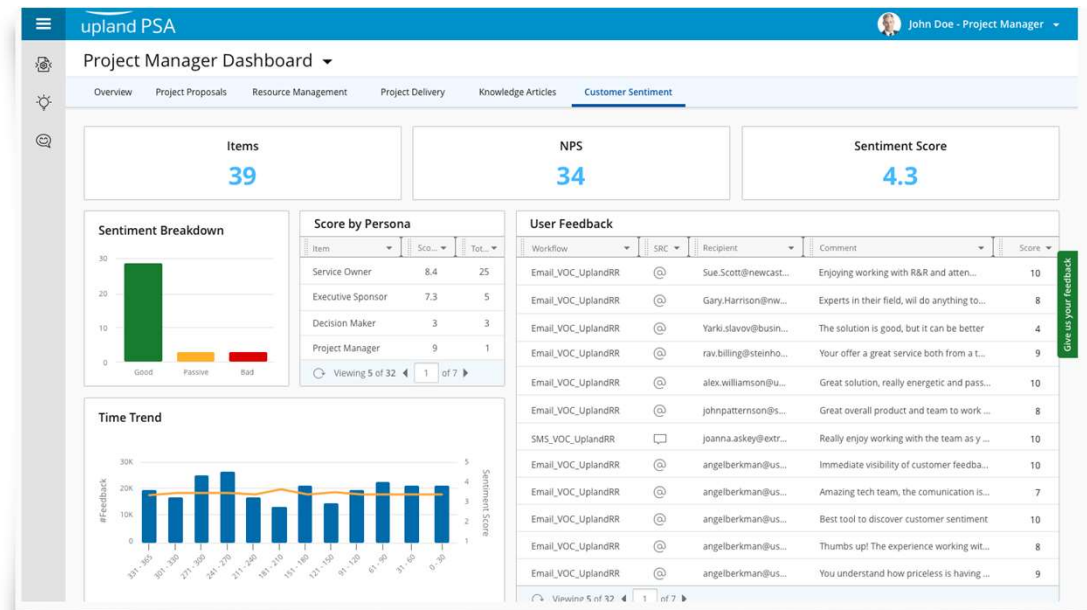
The Path to Profitability

It wasn't by accident!!

- Measuring business performance in combination with continuous improvements

- Efficient resource management

18%

- Removing manual tasks by creating automation

- Accurate and timely billing

Future growth trajectory

- Building & sharing knowledge
- Customer sentiment

Can we do better??

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Upland PSA

Enabling Grass Valley's Digital Transformation

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Upland Software at a Glance

UPLD
Russell 2000 Index
Started in 2012

EWM
$25B TAM
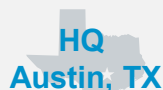
HQ
Austin, TX
Offices Around the World
Lincoln, Boulder,
Montreal, Ottawa, Toronto
Cairo, Dublin, London, Sydney, Tel Aviv

1M+
Global Users

9,000+
Customers

1,500+
Major Accounts

$259MM[1]
Annual Rev Run Rate
>93% Recurring

49%[2]
Revenue
Growth

98%[3]
Net Renewal
Rates

100%
Customer Success
Focus

800+
Team
Members

34% Net Promoter
Score (NPS)

8 Enterprise Cloud Solution Suites

Customer Experience Management	Enterprise Sales Optimization	Contact Center Productivity	Professional Services Automation	Project and Financial Management	Document Lifecycle Automation	Secure Document Services	Enterprise Knowledge Management

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The Foundation for Customer Success

uplandOne

High-Touch Customer Success Program

Quality-Focused R&D

Customer-Driven Innovation

Enterprise-Grade Cloud Platform

Exceptional Global Support

Expert Professional Services

GOAL
100% **CUSTOMER SUCCESS**

(Value + Experience)

MEASUREMENT

Net Promoter **Score**

Financial **Strength**

Customer Relationship **Depth**

Customer-Defined **Value**

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Upland's Enterprise Work Management Cloud

Value Delivered   **Enterprise Cloud Solution Suites**

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Automating and Integrating Enterprise Workflows

DRIVE REVENUE
by delivering outstanding customer experiences and sales productivity

Customer Experience Cloud
- Enterprise Sales Optimization
- Customer Experience Management
- Contact Center Productivity

REDUCE COSTS
by streamlining high-volume processes and ensuring data security and compliance

Document Lifecycle
- Document Lifecycle Automation
- Secure Document Services

Knowledge Management

IMPROVE PRODUCTIVITY
by transforming services delivery and convert cost centers into value drivers

Project & IT Management
- Professional Services Automation
- Project and Financial Management

Cloud-Based Workflow Automation with Deep Functional Solutions
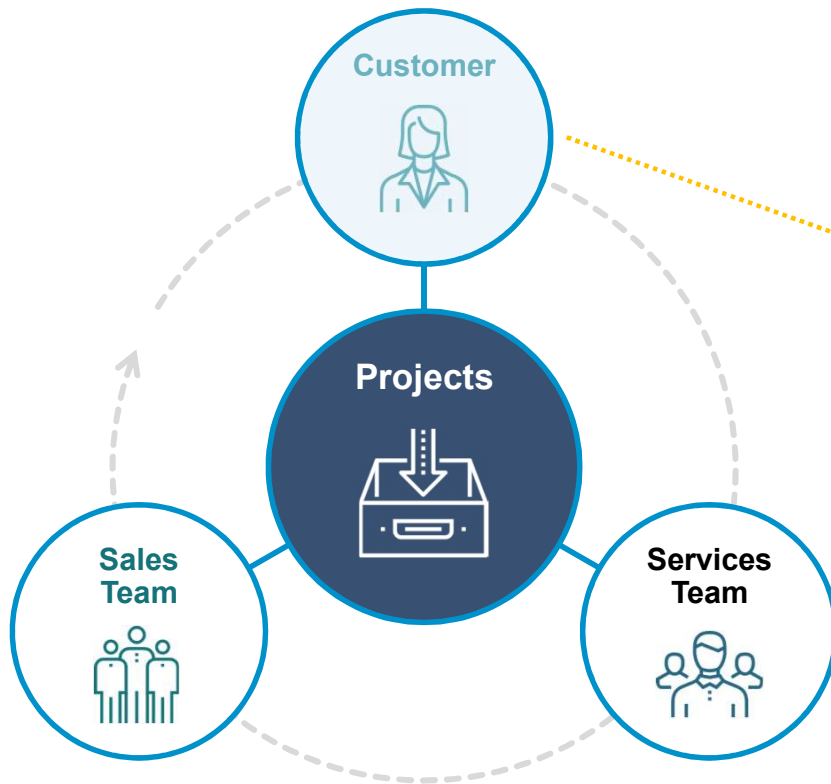
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How Upland is Redefining PSA

The first **knowledge-enabled** PSA suite that includes **sales enablement** and **customer experience management** to fuel a truly customer-centric Services business from bid to bill to loyalty.
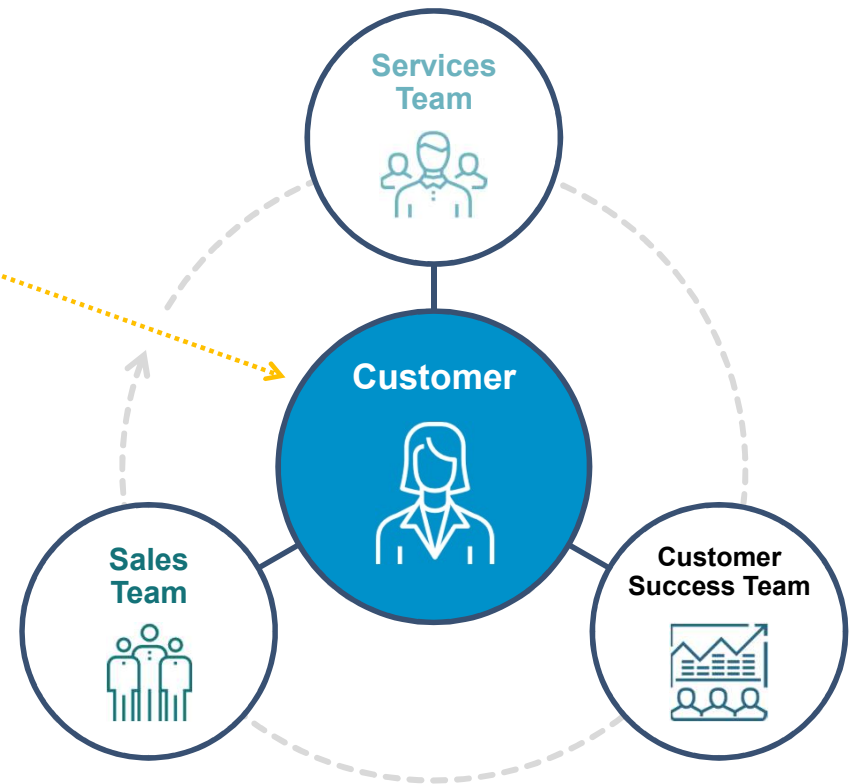
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From Project-Centric to Customer-Centric

Traditional PSA
Focuses on Project Lifecycle

Customer-Centric PSA
Focuses on Customer Lifecycle

Customer

Projects

Sales Team

Services Team

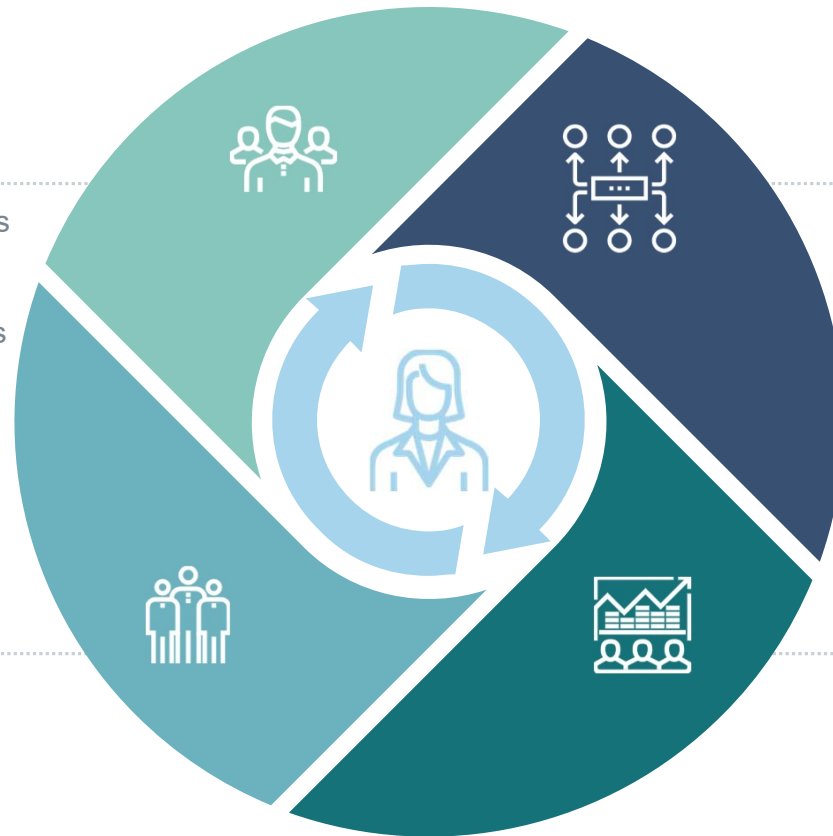Services Team

Customer

Sales Team

Customer Success Team

Customer-Centric PSA

Sales & Services Alignment

Harmonize Sales & Delivery teams and facilitate cross-team collaboration to produce timely, more accurate customer proposals

Delivery & Execution

Robust PSA with embedded Knowledge Management and native Analytics empowers internal teams to drive better project outcomes
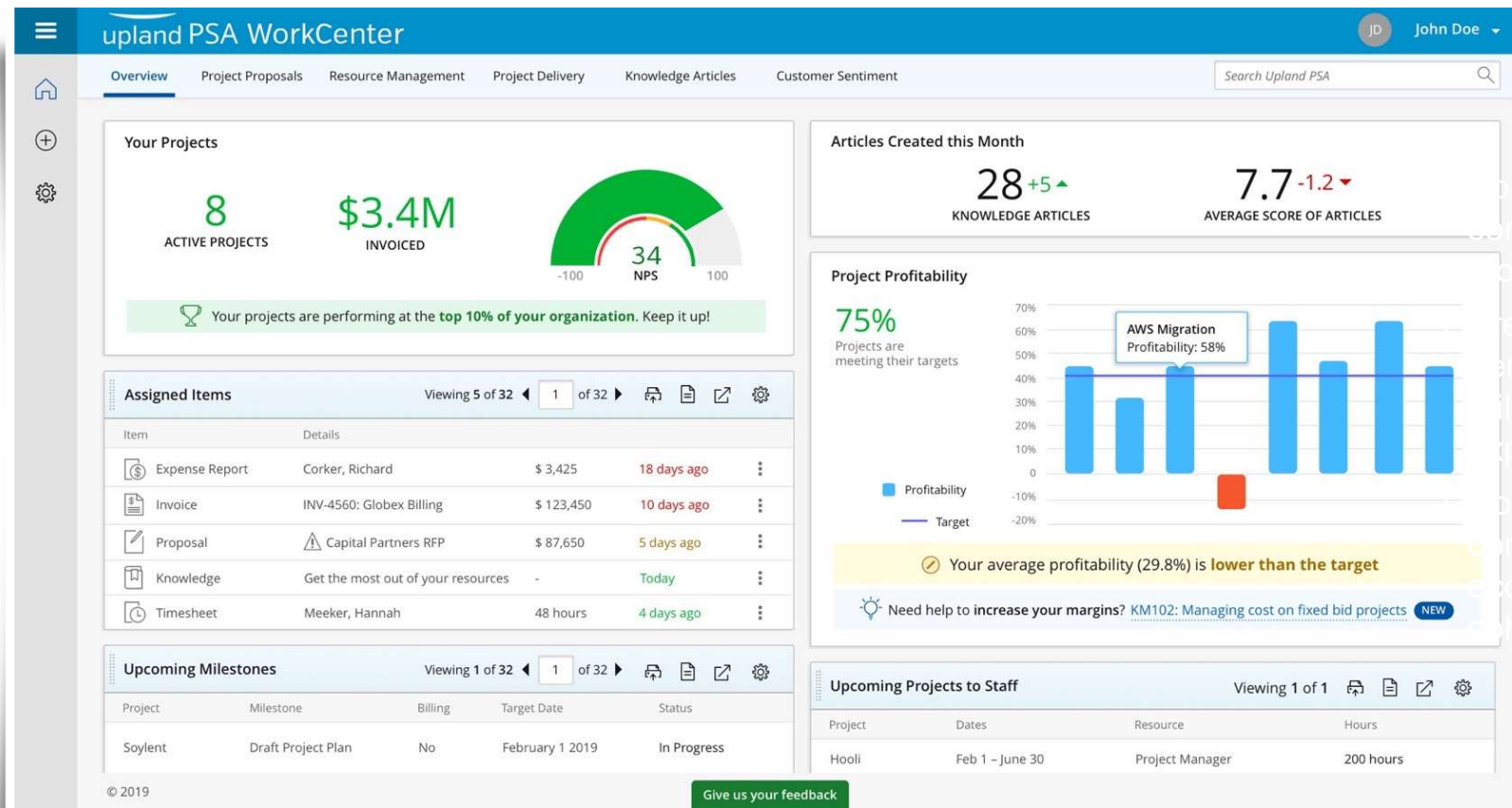
Customer Success Management

Empower Customer Success Teams with feedback to improve relationships and fuel loyalty

Customer Collaboration

Create a customer portal to actively engage your customers throughout the project

upland **PSA**

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Upland PSA

Quiz!!! Prizes!!!

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upland PSA

Fuel your customer-centric services business from bid to bill to loyalty

+ Enterprise-grade platform that brings together traditional PSA with proposal automation, knowledge management and customer sentiment automation

WANT MORE?
Booth 35 @ TSW

PSA uplandsoftware.com/psa

in Upland PSA

@uplandpsa

Thank You
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