



# Subsidiary Synergy: Accelerating Handoffs & Unlocking Utilization

**Case Study**—Marketing/Live Events Firm

# The Challenge



**Events Marketing Firm:** The company is a global experiential-marketing network with 1,200 staff delivering brand activations, events, content, sponsorships, and hybrid/digital experiences for major clients. Balancing centralized standards and sustainability with local agency autonomy, with annual revenues exceeding \$125M USD. Growth is driven through acquisitions, alliances, and scaling of core capabilities.

**Solution Area:** Implementation and configuration of Salesforce & Certnia Products

## Pain Points:

The company operated in a **single Salesforce org**, despite functioning as a parent company with **three subsidiaries**:

- Service lines were priced and quoted at the subsidiary level but had to roll up to the parent company level.
- Subsidiaries delivered work in multiple phases, on different schedules, requiring **multi-phase opportunities**.
- Teams were working **on top of each other in Salesforce**—multiple groups updating the same opportunity, creating confusion and inefficiencies.
- Lack of **visibility at both subsidiary and parent levels** caused delays, reporting inaccuracies, and friction between teams.
- The operations team required **Certinia PSA** aligned to this subsidiary opportunity structure.



# The Coalescence Solution

- **Products**
  - **Salesforce Sales Cloud & Tableau**
  - **Certinia PSA & Financial Management**
- **Salesforce Sales Cloud Relaunch** with a **restructured hierarchy**: subsidiaries gained independent control of their opportunities, pricing, and updates, which then rolled up seamlessly to the parent record.
- This created “**guardrails**” and **swim lanes** — subsidiaries could operate independently without overwriting each other while leadership has real-time roll-ups.
- **Certinia PSA & Financial Management** deployed in tandem, designed with aligned roles, access models and data structures.
- Agile implementation ensured minimal disruption while delivering a tailored sales and operations experience.



# The Implementation



```
3 require File.expand_path("../support_helper", __FILE__)
4 # Prevent database truncation if the environment is production
5 abort("The Rails environment is running in production mode!")
6 require 'spec_helper'
7 require 'rspec/rails'
8
9 require 'capybara/rspec'
10 require 'capybara/rails'
11
12 Capybara.javascript_driver = :webkit
13 Category.delete_all; Category.create
14 Shoulda::Matchers.configure do |config|
15   config.integrate do |with|
16     with.test_framework :rspec
17     with.library :rails
18   end
19 end
20
21 # Add additional requires below this line. See the README for more details.
22 # Requires supporting ruby files with support_* in support/ and its subdirectories.
23 # spec/support/ and its subdirectories. These files are loaded by default.
24 # in _spec.rb will both be required. If you have any other files,
25 # run twice. It is recommended that you do this.
26 # end with _spec.rb. You can configure this behavior by using
27 # options on the command line or in the config file.
28 # action on the command line or in the config file.
29
30 No results found for 'mongoid'
```

- **Stage 1 – Initial Assessment:** Process mapping, visibility requirements, subsidiary needs analysis.
- **Stage 2 – Sales Cloud Redeployment:** Rebuilt opportunity hierarchy for independent subsidiary input + top-level rollup.
- **Stage 3 – Certinia PSA Deployment:** Enabled multi-level project and resource management.
- **Stage 4 – Certinia FM Deployment:** phased transition from Sage Intacct to integrated financials.

# Project Results

- **39% faster Sales-to-Delivery handover:** subsidiaries now update independently with consolidated rollups, avoiding conflicts and delays.
- **11% YoY increase in billable utilization:** better visibility into resource assignments and project delivery efficiency. (32% reduction in non-billable time)
- Improved collaboration between subsidiaries and parent, with clearer accountability and reporting accuracy.
- Reduced AR DSO (Days Outstanding) from 40 to 28 days



*“We worked with Coalescence Cloud on a complex Salesforce rebuild and Certinia PSA & ERP implementation. The team provided exceptional design and advisory services to deliver a truly tailored solution! I highly recommend working with Coalescence Cloud if you value a collaborative experience, successful delivery, and cutting edge solution design!”*

*~ Client’s Executive Sponsor featured on Salesforce AppExchange*

# In Summary:

A global experiential marketing network operating with multiple subsidiaries faced with inefficiencies and visibility issues when teams overlapped in Salesforce. Coalescence Cloud, Inc. redeployed Sales Cloud with independent subsidiary hierarchies, integrated Certinia PSA and FM, and established guardrails for clearer accountability. **The result was a 39% reduction in Sales-to-Delivery handover time and an 11% YoY increase in billable utilization,** enabling faster delivery and greater efficiency across the business.