

Case Study

Action automates "quote-to-cash" and enables TE21 to focus on growing their business



Challenges

- Slow manual accounting and reporting process
- Error prone reporting due to lack of automation
- Needed to scale processes to match growth

Solution

- Investment in NetSuite and Salesforce, with the Actian Connector for integration and scalability between the two systems

Outcomes

- Integration and automation saves 20 hours per week
- Achieved realtime reporting on processes that used to take weeks
- Better insights into processes and results for management teams

Highlights

TE21, Inc. is an education company that offers assessments aligned with College- and Career-Ready Standards/Common Core State Standards (CCSS), intervention, professional development, as well as other education improvement efforts for schools and districts. Its educators and support staff members are committed to partnering with our customers to improve the educational experience of students. TE21 is known for providing excellent training for every product it represents or develops.

"We greatly reduced potential errors and removed the manual process with the Actian Connector between Salesforce and NetSuite. Before, we would produce quotes in Excel, invoice in QuickBooks and record cash collections with separate manual reports at each stage of the process. Now, we have an automated 'quote-to-cash' process that has saved us a tremendous amount of time and allowed us to focus on what we do best and grow our business."


Challenges

As TE21 grew and developed more complicated business processes, they found themselves outgrowing their manual QuickBooks solution and desired a more in-depth, robust and automated process. The company had also developed a need for a CRM system that enabled a true "quote-to-cash" process starting with sales which could be easily connected to their financial billing, collection and reporting system. Blaise Buczkowski, TE21's Chief Strategy Officer, led the effort to find a better solution that could handle the challenges of the growing business.

Solution

TE21 began tackling this issue by researching ERP systems with the ability to seamlessly integrate with a CRM system and landed on NetSuite and Salesforce.

"From there, it was a matter of figuring out how to integrate data between Salesforce and NetSuite in a way that would best suit our needs," said Blaise. "There were a couple of different integration options that we considered, and we decided to go with Actian because



of their experience with integrating NetSuite and Salesforce data. Also, Actian's direct partnership with NetSuite helped to simplify communication around configuring the integration to meet our specific needs."

Results

After 6 months of customization between NetSuite and Salesforce, Actian successfully integrated the two systems and TE21's new automated process was up and running in time to meet their end of fiscal year goal.

"We love it. We are now able to push the quotes through, create the sales orders and invoice them as soon as the sales orders are approved, and it's all been working very well," said Blaise. "Actian has been great to work with on little tweaks here and there for mapping data points that I didn't think about during set up."

After integration, TE21 saw numerous tangible business results such as reduced reporting time, better insights into processes and results for management teams, more accurate and timely pipeline information, and improved efficiency equal to hiring a part-time accountant. When asked about what she would do differently next time, Blaise immediately said she would have done better resource planning up front and had a person dedicated to driving the CRM implementation and another to drive the ERP implementation.

"When going through two system implementations and an integration for the first time, you need a lot of handholding. It's very difficult, it's very challenging," said Blaise. "But Actian and NetSuite helped make our integration a success. They have great customer service and are always willing to help out. They're awesome to work with."

Actian Salesforce Connector for NetSuite

Providing automatic data synchronization between Salesforce and NetSuite, the Actian Salesforce Connector for NetSuite is preconfigured to handle end-to-end lead-to-cash process across standard NetSuite and Salesforce. For additional requirements, users have the ability to further customize the integrations, cutting down on lengthy integration cycles with external vendors. The quicker integration cycle leads to faster business value:

- Easier order and quote creation
- Orders and invoicing in real time
- Full visibility to sales and finance
- Fewer delays and errors in lead-to-cash cycle
- Better cash flow/lower DSO (Days of Sales Outstanding)



www.actian.com

2300 Geng Rd., Suite 150, Palo Alto, CA 94303
+1.888.446.4737 [Toll Free] | +1.650.587.5500 [Tel]



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(CS36-0916)