# BLAZE YOUR TRAIL

# INTRODUCTION

The need for businesses to connect the front and back offices has never been greater than it is today. That's because customer expectations for a seamless experience have never been higher.

Your customers, for instance, expect your customer service agents to have access to all of their information when they call. If agents are slowed down by the need to access tech support on one system, account balance assistance on another, and contract renewal on a third, you can bet customers will take their business elsewhere.

In addition, your employees have come to expect the tools in their workplace to function just as well as the mobile apps they use on a daily basis. Employees who use their phones to manage their finances, order delivery, hail a ride, and communicate with people around the world crave a similar experience with the apps they use at work. They want to be able to work from the road, from a plane, from their homes, all without losing productivity. And a generation that has grown up with the cloud has come to prioritize these capabilities in their job searches.

So how do you stay competitive, both with your customers and employees? Back office AppExchange apps can help. In this e-book, we'll share the stories of six AppExchange customers that use apps to help connect their IT, accounting, HR, and ERP systems to the front office – delivering the experience their customers and employees expect and deserve.

Meet Appy, your guide to all things AppExchange. She's in the know about apps and really wants to share her knowledge with you. For example, want to know which front and back office apps our customers love? Read on to find out.
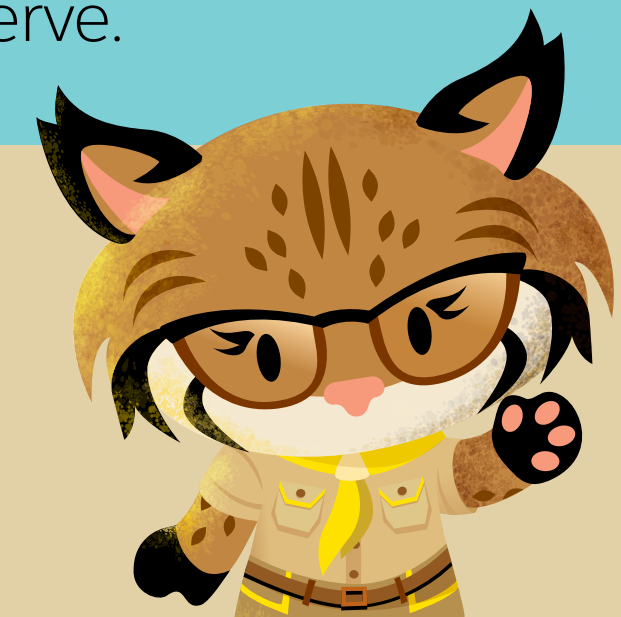
# IT APPS
## CONNECTING TECHNOLOGY DEVELOPERS TO DECISION MAKERS

A new generation of customers and employees is gradually taking over the workforce as buyers and sellers of technology. This generation expects information to be available on any device, at any time, so that they can work anywhere. This has led to a rapid migration toward the cloud.

In Salesforce's "State of IT" report, 73% of cloud-enabled companies say their executive team is leading the business in a digital transformation, and cloud migration is the top-ranked priority for IT leaders surveyed in the report.

For Salesforce customers, AppExchange apps let IT departments bridge the connection between the technology developers in the back office and the decision makers and employees in the front office – sales, service, and marketing – as well as with customers.
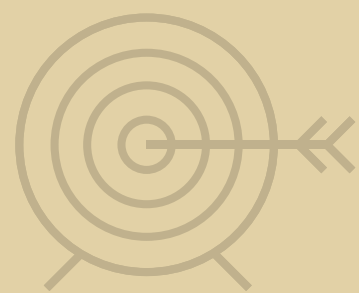
# SKUID AND INTUIT

**The Skinny:** Intuit is a software company that builds products like QuickBooks and TurboTax, as well as tools for the gig economy to help individuals with part-time jobs do their accounting and taxes. Amanda Joslin, Group Manager of Product Management at Intuit, manages a team focused on their customer service agents' tools and technology.

**The Challenge:** Joslin and her team focused on taking their agent experience to the next level. However, Intuit agents used upward of four tools in a single day for tasks ranging from selling products to finding the right data to service their customers. The result: longer handle times between agents and customers as agents switched tools during an interaction – for example, it took 59 clicks and over five minutes to place a single order.

**How Skuid Helped:** Skuid enabled Intuit's 2,000 sales and care agents to sell subscriptions within Salesforce – while also getting a 360-degree view of the customer.

Intuit's developers, according to Joslin, loved the ease of use in creating a table structure with Skuid, and now can rapidly put together a screen and prototype it alongside the agents.

Engineers also raved to Joslin about the ability to search fields with Skuid pages. To date, Intuit has built nine Skuid apps, with plans to launch more.

**The Results:**

▷ Saved 1,000+ lines of code

▷ Need one single tool for agents instead of four

▷ Reduced by 84% the number of clicks to place an order

▷ Cut by 50% the time needed to sell product

FIND OUT MORE ABOUT SKUID >
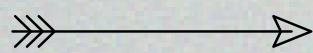
"As the engineers and users started working with Skuid more and more, the use cases have fueled our expansion of the tool."

– AMANDA JOSLIN
  INTUIT
  GROUP MANAGER OF PRODUCT MANAGEMENT

# DELL BOOMI AND AMEX GLOBAL BUSINESS TRAVEL

**The Skinny:** American Express Global Business Travel (GBT) is a joint venture with American Express that provides end-to-end business travel tools to optimize travel management and provide a better traveler experience, all while saving money for businesses. Prasant Panicker is the Engineering Director of GBT Enterprise Architecture and Engineering, and is responsible for setting up and maintaining corporate applications from scratch.

**The Challenge:** After GBT split from American Express and became a joint venture, a transitional service agreement between the two companies allowed GBT to use American Express systems and services until it set up its own. There was a cost associated with this – in addition to being dependent on the parent company to meet the team's needs, Panicker and his team had to stand up corporate applications with very strict time lines. With all these applications and platforms spread out across the globe with tight time lines, Panicker knew he needed an integration platform immediately. Enter Dell Boomi.

salesforce

**How Dell Boomi Helped:** Dell Boomi helped GBT connect cloud platforms to better exchange information. For instance, the company needed to move HR data into Salesforce, Coupa, NetSuite, and others, and used Dell Boomi to centrally manage those integrations.

Integrating platforms and data provided a seamless experience for end users – for example, out-of-pocket expense reports that needed to go to payroll are now handled through Dell Boomi.

**The Results:**

▷ Easily met aggressive time-to-market goals

▷ Utilized local technical talent to implement

▷ Removed dependency on external vendors

▷ Brought work internally to reduce costs

▷ Promoted employees initially brought in to work with Dell Boomi to other roles

FIND OUT MORE ABOUT DELL BOOMI >
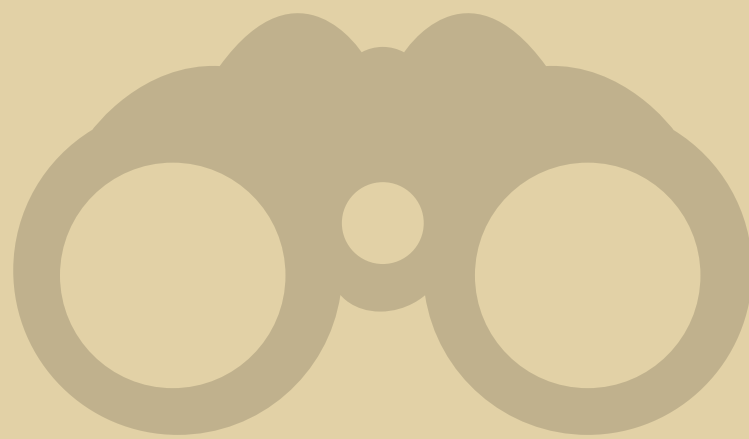
"With Dell Boomi, we've been able to accomplish everything we set out to do. They're a strong partner, always willing to listen, and regularly meet with us to provide roadmap updates. They're eager participants in our journey."

– PRASANT PANICKER
ENGINEERING DIRECTOR OF GBT ENTERPRISE
ARCHITECTURE AND ENGINEERING

# ACCOUNTING APPS
## PROVIDING A COMPLETE FINANCIAL VIEW OF CUSTOMERS

Companies of all sizes face challenges, and thus opportunities, in ensuring finance and accounting teams operate more efficiently. For many companies whose accounting departments moved from written ledgers to legacy software, hesitation in moving to the cloud and cloud-based apps is natural.

Yet the common troubles that accounting departments face – errors resulting from manual data entry, an overreliance on spreadsheets, a lack of collaboration between the accounting team and front-office teams – are all issues that AppExchange apps can solve.

AppExchange customers regularly tell us how apps have increased efficiencies, reduced costs, and increased communication between accountants and front-office employees. In turn, the company gets a full, accurate view of their customers, creating a better experience when customers interact with the business.

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# FINANCIALFORCE ACCOUNTING AND WINDWARD

**The Skinny:** Windward Consulting Group is a global consultancy that focuses on working with Fortune 500 financial services and telecommunication companies to help them manage their large data centers and global networks. Sean McDermott is President and CEO of the 20-year-old company, which has used Salesforce for more than a decade.

**The Challenge:** Windward was trying to figure out how best to manage projects on an ongoing basis as the company grew and scaled through the years. A lot of financial information, from project tracking to invoicing, was locked in an old accounting system on the Microsoft Dynamics platform. This made it difficult to extract and use data.

The original problem Windward tried to solve was around professional services automation, but it quickly realized that in order for that to work correctly, it had to be tightly integrated into an accounting system. And Windward's current accounting system was too onerous to integrate.
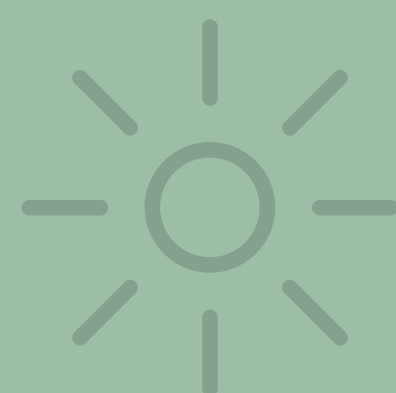
**How FinancialForce Accounting Helped:** With FinancialForce, Windward is extracting data in different ways. "I can't remember the last time we actually created an Excel spreadsheet, which is good because we have a 'no Excel' mantra right now," McDermott said.

Windward has also taken advantage of the integration with the Salesforce1 Mobile App, which allows staff to approve timesheets, invoices, purchases, and orders, right from the app. Accounting is no longer a bottleneck for the company. Reports are automatically generated, and project managers and account teams can run their own reports and dashboards.

**The Results:**

▷ Saved $100,000+ by avoiding overhaul of existing accounting system

▷ Eliminated Excel spreadsheets and pivot tables for 40-50 projects per week

▷ Got instant access to comprehensive data not available before

▷ Gained insight into aspects of the business that needed improvement

FIND OUT MORE ABOUT FINANCIALFORCE ACCOUNTING >

"FinancialForce Accounting has been a game changer for us, and I'm really excited to see where it can take us. We now have access to all of this data, and we need to figure out what to do with it. We're just at the start of this, and it's really interesting."

– SEAN MCDERMOTT
WINDWARD CONSULTING GROUP
PRESIDENT AND CEO
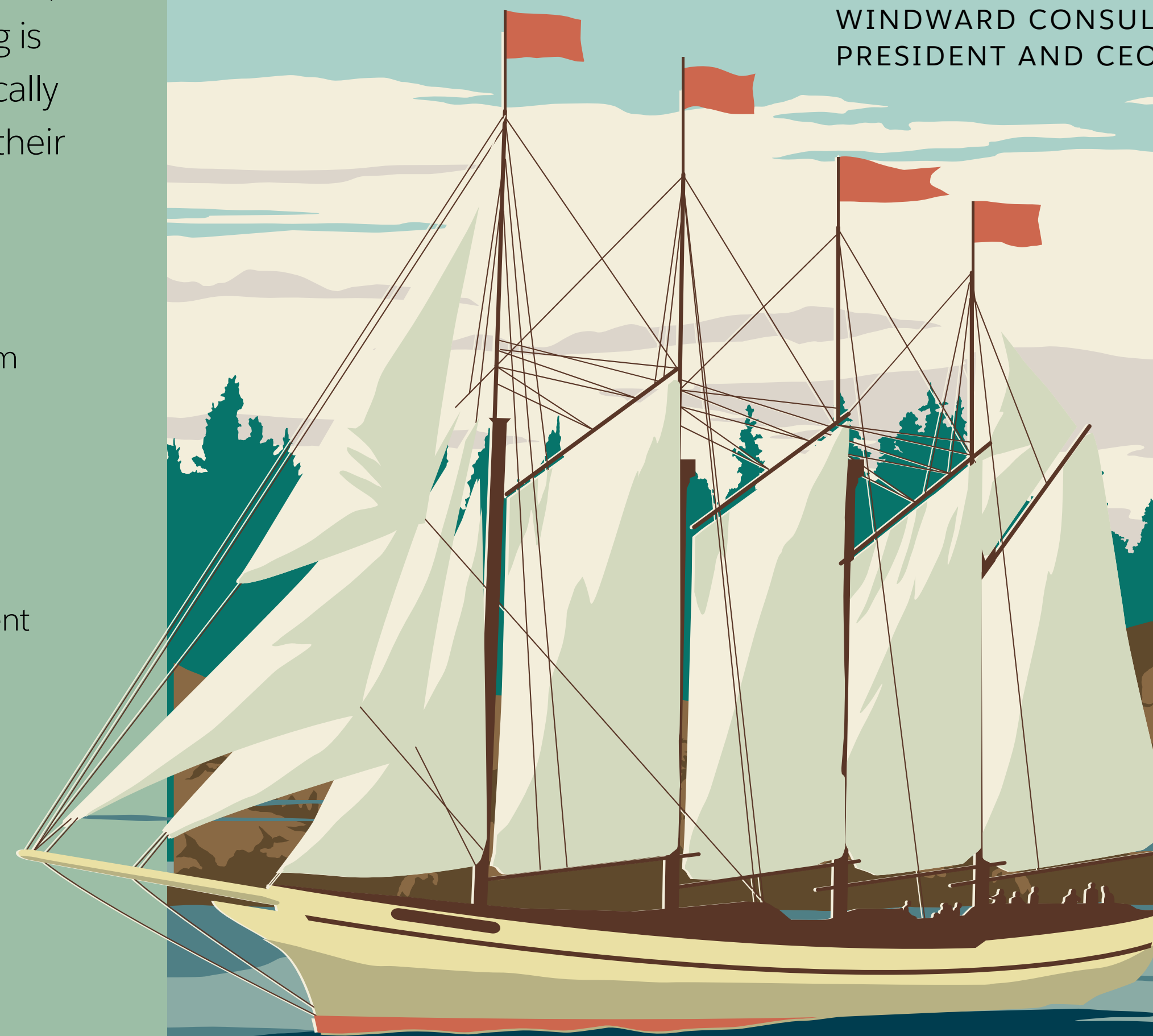
# ACCOUNTING SEED AND CQ INFUSED BEVERAGES

**The Skinny:** CQ Infused Beverages is a B2B subscription-based beverage company that provides a proprietary, patent-based infused beverage system in which customers transform their existing water, iced tea, club soda, or lemonade into a variety of specialty infused beverages by adding the company's purees.

These eco-friendly infused beverages can be found in spas, club lounges, banquets, and hotel lobbies. Matthew Farruggio is President of California Quivers Inc. (the manufacturing arm) and VP of CQ Infused Beverages, LLC (the distribution arm).

**The Challenge:** CQ Infused Beverages was using a legacy accounting system that didn't have the connectivity and functionality that the growing company needed. The software limited what Farruggio's team of accountants could accomplish. CQ Infused Beverages was also snail-mailing bills, which Farruggio said "was a nightmare."

**How Accounting Seed Helped:** Accounting Seed enabled CQ Infused Beverages to create a trigger when new subscriptions are signed to ship product at given intervals. In turn, that allows the company to run projections on how much of a given product it will need based on the contracts it signed over a given time period.

Additionally, CQ Infused Beverages can now send bills to multiple people within an organization rather than sending them through the mail, and keep sending to more contacts if customers are overdue on payments. Integration with Salesforce Marketing Cloud also enables invoices to trigger SMS, email, or tasks to move customers along their journey.

**The Results:**

▷ Saved enough money to have Accounting Seed pay for itself by eliminating legacy software credit card processing fees

▷ Saved money by limiting accounting headcount by at least two employees

▷ Allowed CQ Infused Beverages to accurately project inventory based on orders

▷ Provided a single source of truth for the entire team – everyone is now on the same page

FIND OUT MORE ABOUT ACCOUNTING SEED >

"Accounting Seed pretty much runs our entire business. It brings our whole business together and everybody on the same page. I love it."

– MATTHEW FARRUGGIO
PRESIDENT OF CALIFORNIA QUIVERS
VP OF CQ INFUSED BEVERAGES

# ERP APPS
## CONNECTING DATA TOGETHER
## TO IMPROVE MULTIPLE INDUSTRIES

Enterprise resource planning (ERP) offers a number of applications across different industries. Typically used, though not exclusively, by manufacturers, ERP solutions help companies manage and integrate areas such as planning, purchasing, inventory, sales, marketing, finance, and HR.

As Investopedia explains, "Think of ERP as a central nervous system for a business." If the ERP is the central nervous system, auxiliary systems that manage data from all parts of the organization should integrate into the ERP. Cloud ERP solutions can connect all of this data together to streamline forecasting, supply chain management, and the connections between vendors and customers.

Take the manufacturing industry, for example. In Salesforce's special report "Revolutionizing Customer Service in Manufacturing", 72% of manufacturing teams agree that a shared, single view of the customer is very important to their overall service process. Using AppExchange apps to connect back office planning with front office sales and service teams can help achieve this vision.
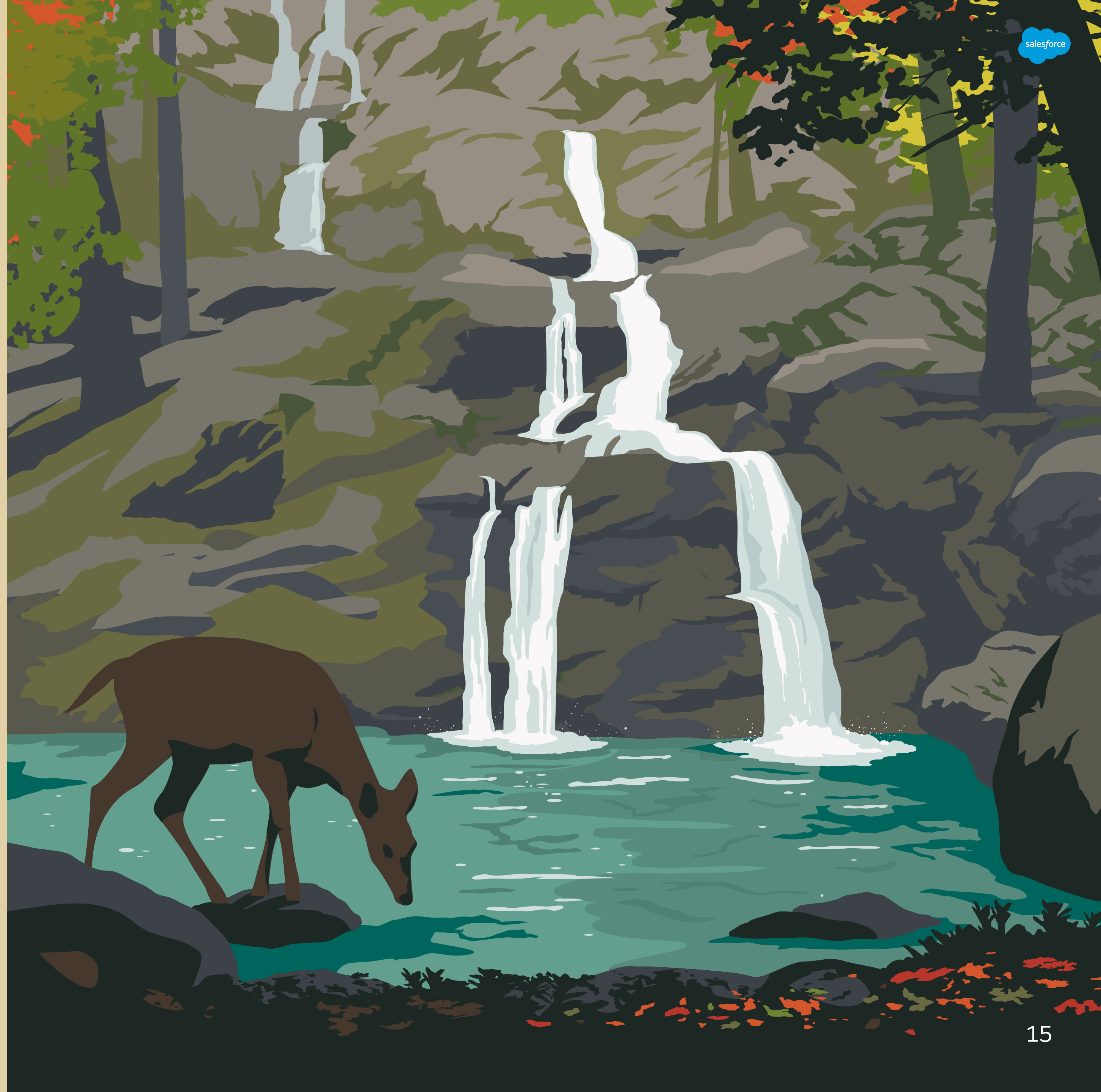
# KENANDY CLOUD ERP AND PRIMUS POWER

**The Skinny:** Primus Power is a developer and manufacturer of long-life energy storage systems. The company makes large, grid-scale flow batteries that ship to utility, microgrid, and military customers. Mark Collins is the VP of Operations, managing operations and accounting functions.

**The Challenge:** Several years ago, Primus Power was ready to implement its first ERP system. Since Primus was shipping products in more significant quantities, Collins realized that the company had outgrown its legacy accounting system, Excel, and manual work-arounds. It was essential that a new solution seamlessly integrate with Salesforce and Arena Product Lifecycle Management (PLM). Not only would this allow for integrated workflows across the systems, but it would also boost efficiency.

Additionally, Primus Power was looking for a system to provide real-time visibility into orders, inventory, requisitions, and more. And because the company was working with suppliers and customers all over the world, this information had to be accessible through mobile devices.

**How Kenandy Cloud ERP Helped:** With Salesforce, Kenandy, and Arena PLM all seamlessly connected, Primus Power was able to replace the manual and error-prone process of verifying up to 1,000 line items per Bill of Materials (BOM). Engineering can now create a new BOM in the PLM system, and minutes later, the same information would be available in Kenandy and Salesforce.

Kenandy also provided Primus Power with access to real-time financial and operational data. Sales representatives can see the actual inventory, engineering can look up delivery dates of parts that have been ordered, and management has a better understanding of the health of the business.

## The Results:

▷ Sped up processes and controls to keep up with the 50%-60% growth rate in their vertical by running CRM, PLM, and ERP on the same platform

▷ Delivered live data of its sourcing process, plus full traceability of orders, by whom and at what price, alongside the order's entire history

▷ Benefitted from the collaboration capabilities of the platform by using Chatter, integrated with Kenandy, to help clarify specific documents such as purchase orders and invoices

FIND OUT MORE ABOUT KENANDY CLOUD ERP >

"The way I always put it to people is: 'I can't imagine us doing what we have done and what we are currently doing without Kenandy.'"

– MARK COLLINS
PRIMUS POWER
VP OF OPERATIONS

# HR APPS
## TRANSFORMING EVERY STEP OF THE EMPLOYEE EXPERIENCE

Connecting back office HR systems to engagement systems can impact both employees and customers. Today's employees expect the same level of engagement at their jobs as they experience in their personal lives. But legacy systems can weigh down attempts to transform the experience provided by human resources departments. According to Gallup, 70% of U.S. workers are not engaged at work, but engaged workers are 21% more productive. And according to the Corporate Leadership Council, engaged workers are 87% less likely to leave companies.

Moving to the cloud and implementing cloud-based apps from AppExchange can transform every step of the human resources experience, from onboarding and recruiting, to learning and performance management, to help desks and employee communities. And when employees are happier, more engaged, and more knowledgeable about their jobs, the benefits cascade down to customers.

# CONGA AND FINEMARK NATIONAL BANK & TRUST

**The Skinny:** FineMark National Bank & Trust is a full-service bank and trust company with $1.5 billion in bank assets and $2.6 billion in assets under management and administration. In addition to banking services, FineMark offers comprehensive investment, trust, and estate planning services to high net-worth families. Kimberly Wargo is the Salesforce admin at the company, managing the platform and any AppExchange apps brought onto the platform.

**The Challenge:** The biggest challenge FineMark faced, according to Wargo, was time management. The bank is a lean organization, and associates perform multiple jobs. For FineMark associates, a good portion of their day was spent generating documents through Microsoft Word, manually inputting information. "It was really important to us to free up our associates so they could spend more time developing relationships," said Wargo. "It was equally important to eliminate errors caused by manual data entry. When you're dealing with multi-million dollar accounts, you can't make an error."

**How Conga Composer Helped:** "Conga Composer transformed how we do our documents," said Wargo. From start to finish, she said, it only took 2-3 weeks to get the first document templates up and running. The largest users are trust associates who use Composer to save time and eliminate error due to manual entry, such as transposing a name or missing a zero on a document.

Meanwhile, internal associates who use Composer can, for example, click a button and get a size 10 envelope with everything preformatted on it, or generate a standard welcome letter with a new client's information populated. Eventually, Wargo wants to bring every document the bank generates into a one-click process through Salesforce, and to integrate e-signatures.

## The Results:

▷ Improved efficiency

▷ Freed associates to perform more valuable tasks for their clients and the company

▷ Limited user costs while still growing year-over-year

▷ Reduced document generation process to just a few clicks

FIND OUT MORE ABOUT CONGA COMPOSER >
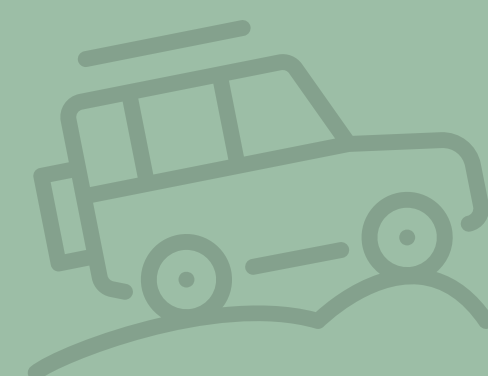
"Conga Composer has improved efficiencies. Our associates are very happy with it, and it has freed up their time to develop client relationships and accomplish more value-added projects for the company."

– KIMBERLY WARGO
FINEMARK NATIONAL BANK & TRUST
ASSOCIATE VICE PRESIDENT/SALESFORCE ADMINISTRATOR

# FEATURED APPS TO HELP YOU BLAZE A TRAIL

**ACCOUNTING SEED**

Accounting Seed automates your accounting with sales and marketing while managing financials across your entire business cycle.

**CONGA COMPOSER**

Conga Composer eliminates manual work by simplifying processes with document automation – increasing productivity up to 100x.

**DELL BOOMI**

Dell Boomi automates your business processes, seamlessly moving, managing, and governing data from any source.

**FINANCIALFORCE ACCOUNTING**

FinancialForce Accounting streamlines your opportunity-to-cash process, manages revenue precisely, and generates real-time financial analysis on Salesforce.

**KENANDY CLOUD ERP**

Kenandy maps your ERP to your core processes, boosting efficiencies in your business processes as it integrates with CRM.

**SKUID**

Skuid transforms UX without code, empowering users to build opportunity management apps while streamlining your sales process.

# CONCLUSION

It's critical to remember that providing back-office departments with the right tools for employees to do their jobs as efficiently and effectively as possible is just as important to the success of your organization as arming the front office. Those tools, in the form of AppExchange apps, can help reduce tasks caused by the use of legacy software, and better integrate with customer-facing employees in the front office. Together, back-office AppExchange apps can maximize the value added by your employees, while also providing customers with a better experience. It's a win-win.

**VISIT APPEXCHANGE.COM**