

THIS FIRM MAXIMIZED ROI IN JUST 5 MONTHS & NOW HAS REAL-TIME REPORTING WITH LESS MANUAL DATA



Challenge

Siloed CRM & ERP solutions, lack of system administration, reporting & analytics



Solution

Implemented Salesforce Sales cloud, Sage Intacct, integrated both solutions to optimize utilization



Result

One- stop shop for quote-to-cash process, real-time reporting & analytics, eliminated manual data entry

FINANCIAL SERVICES FIRM SEEKING HOLISTIC QUOTE-TO-CASH SOLUTION POST ACQUISITION

A global financial services firm had been recently acquired and sought a holistic quote-to-cash solution to help them expand their global footprint. The company had grown tremendously in the past couple years and was starting to experience roadblocks from siloed CRM and ERP solutions.

They sought Armanino's advisory services on the most applicable and scalable CRM platform, Salesforce. The company needed a seamless sales process, robust sales nurturing, customizable integration with their ERP system, real-time reporting capacity, and a configurable connected solution that would support a future marketing platform and customer community.

The firm was a spin-off from a large financial services institution and needed to get on its own ERP system as soon as possible. Sage Intacct was a solution that implemented seamlessly with Salesforce and enabled the firm's enterprise sales team to provide summarized, automated quotes to their customers.

The company engaged Armanino to be their quote-to-cash trusted advisor. Our Salesforce and Sage Intacct team completed a 5-month phase one implementation, followed by a 3-month phase two managed system enhancement period, and helped the firm accomplish the following:

- Achieved real-time reporting for different user personas, ensured data integrity and significantly reduced manual data entry

- Solved complex account and opportunity records with no custom development effort
- Implemented Salesforce and Sage Intacct with real-time integration
- Onboarded all system users successfully through extensive trainings
- Developed consistent account/customer management structure between CRM and ERP
- Ensured compliance with ASC 606 for selling long-term contracts to their customers
- Annual ROI of > 200% and payback period within the first subscription year

Once the successful phase one implementation finished and both systems went live, the company engaged Armanino on a managed service basis to help with continuous system customization and user adoption trainings. By obtaining different user personas' feedback after the systems went live, we were able to customize specific workflow, page layout, integration data points, etc. to refine the overall implementation and continue to drive utilization.

The results of the implementation were transformational. The company now has an automated quote-to-cash process that saves time and enables its sales team's success, with real-time reporting and analytics and reduced manual data entry.

Armanino's one-team approach helps us efficiently and effectively analyze, design, solve and deploy quality solutions within a short timeframe. Learn more about this offering and our [services](#) on our website.