

SchoolDude.com Increases Productivity and Reduces Costs with Intacct

“We make a change in Salesforce and the data is instantly updated in Intacct, and vice versa. We now have a centralized repository for all our front-office and back-office data. Intacct and Salesforce serve as the hub of our business, allowing us to better serve the national educational market.”

- Kent Hudson, CEO and Founder
SchoolDude.com

Problem

SchoolDude.com, a provider of online tools for management of school operations, struggled with a staggering number of different software applications that hampered their ability to manage customer relationships and back-office operations. For example, finance staff had to toggle between different systems to manage invoices, returns and accounting.

Productivity in the front-office was similarly compromised as sales staff using Salesforce couldn't convert sales quotes into orders without switching to a separate order-entry system. In consequence, revenue suffered because sales people had to spend more time on account administration and less time on business development. Meanwhile, the lack of integration between systems deprived managers of key financial insights that could help them make better business decisions.

Solution

By adopting Intacct's Web-based financial applications through Salesforce.com's

AppExchange, SchoolDude.com instantly achieved front and back office integration. Changes made in Salesforce are automatically reflected in Intacct, and vice versa — and the sales people never have to leave the familiar Salesforce interface.

The integration allows sales people to create orders directly in Salesforce. Intacct's Web-based delivery enables field reps to verify pricing, review product selection and check renewal periods in real time, information normally found in Intacct. The process of tracking orders is also transparent, allowing staff to assess order status and confirm fulfillment in real time.

Result

Integration of its financial management applications with Salesforce helped SchoolDude.com achieve an impressive 97% customer satisfaction rating. Customer support agents now have a 360° view of each customer, which means a single agent can now address every customer issue, from order status to fulfillment to billing. Higher satisfaction



CHALLENGES

- A plethora of disparate systems was costing both revenue and productivity
- No integration meant no insight into key financial metrics between its CRM and financials

RESULTS WITH INTACCT

- Completely integrated front and back offices eliminate duplicate data entry
- Gained a 360 degree view of their entire business
- Achieved 97% customer satisfaction rates by providing their customer support representatives with a complete customer history

has in turn boosted retention, freeing sales reps to target new accounts.

Meanwhile, SchoolDude.com reports lower costs due to data sharing among applications and the elimination of duplicative data entry.

From a strategic standpoint, front- and back-office integration provides superior business intelligence. Instant alerts about new sales prospects, for example, combined with real-time access to customer, pricing and supply-chain information allow SchoolDude.com's managers to make smarter business decisions.