

“Our sales team now sees that deals and requests are being approved instantly - they no longer have to focus energy on the approval cycle and can focus on how to move deals forward and close them, making us more efficient and ultimately profitable.”

Greg Lueck, Managing Partner, Centerstance

Success Story

Customer Profile

Centerstance is a professional services organization (PSO) that helps companies who are confronting business transformation and solution development issues. Founded in 2003, the company is headquartered in Portland, Oregon, with clients around the world. Centerstance helps organizations of all sizes, from small companies to Fortune 500 businesses, identify and move key business processes to the cloud.

The challenges before integration

Centerstance was an early adopter of Salesforce CRM, running the cloud service to manage client facing operations. Centerstance had used two on-premise applications, QuickBooks for accounting and QuickArrow for professional services, to manage back office operations previously. However, these systems were not accurately capturing project information because QuickArrow was complex and time-consuming to use. And while Quickbooks was sufficient when the firm was small, Centerstance was quickly outgrowing it. Moreover, the three systems were not integrated, so there was no single view of performance for the firm.

“With QuickArrow, it was difficult to see where projects were backlogged or where we needed to allocate resources,” said Greg Lueck, managing partner at Centerstance. “Because our CRM, financial, and professional systems were not integrated, we didn’t have the 360 degree visibility to make all the smart business decisions that would help us grow.”

In late 2010, this challenge became even more apparent when Centerstance acquired PSO Ventus Solutions. There was an urgent need to merge systems, cultures, and teams and the company needed to standardize operations and finance processes. The lack of integration was quickly leading to some projects becoming backlogged, understaffed, or lacking the right resources, and it was negatively impacting business growth potential.

Company:

Centerstance Inc

URL:

www.centerstance.com

Company Size:

70 employees

Industry:

Professional Services

Results:

- Integrating PSA and CRM with FinancialForce Accounting on Force.com means management can identify the current state of the business at any time of day, make better decisions, and plan with real and accurate data at their fingertips.
- Dashboards give real-time visibility to help make important business decisions like hiring staff and allocating resources with confidence and accuracy.
- Chatter enables the business to communicate in real time about client issues, future projects, and billing issues.

CRM, PSA and Accounting on Force.com

Long a Salesforce CRM advocate, Centerstance was already familiar with the salesforce.com Force.com platform. Centerstance had been researching the capabilities of FinancialForce Accounting to take advantage of its native integration with Salesforce CRM, and it also learned about FinancialForce Professional Services Automation (PSA). Considering all three solutions run on the Force.com platform, Centerstance knew this would be a logical and smart choice and, because of the flexible nature of the cloud, it was up and running in less than two months.

Operational efficiency is improved with FinancialForce.com

Centerstance quickly started to see the benefits of the integrated environment. Centerstance executives could identify the current state of the business at any time of day, and they could make decisions and plan with real and accurate data at their fingertips. Not only that, the employees were easily able to upload time cards because the system was user friendly and could be accessed in the field with smart phones. "Approval cycles for time cards and project proposals were down to minutes versus days or weeks," says Lueck. "The executive team had little access to the financial or professional services systems in the past. Now we have real time dashboards to help us make important business decisions like hiring staff and allocating resources with confidence and accuracy."

In addition to the benefits of Salesforce CRM, FinancialForce Accounting, and FinancialForce PSA, Centerstance is also a very active Chatter user and utilizes this social business networking tool to help keep the company informed and keep the employees energized. Centerstance is using Chatter to communicate in real time about client issues, future projects, and billing issues.

The benefit of having both back and front office systems running on a single environment like Force.com makes it so much easier to support internally. Centerstance has plans to build out more apps on the Force.com platform for human resources and a commission-based app.

“Approval cycles for time cards and project proposals were down to minutes versus days or weeks.”

“The number of emails I've seen about requesting employees input time cards has gone down dramatically. The system is so friendly -- I see a notice go out to an employee maybe once in a while, every quarter maybe, versus with our previous system it was as common as once a week.”

“Accounting used to have a laborious process of approvals, file exports, and manual data entry into spreadsheets that could take up to a week or so. With FinancialForce Accounting and FinancialForce PSA, generating and approving an invoice is down to a few hours.”