

**SUCCESS STORY**  
OAC Services



In the early '90s, best of breed applications were in. In the late '90s, we started seeing fully integrated, on premise ERP solutions. Then, we moved to disparate cloud solutions which had data spread all over the place, and integration became a challenge again. The best solution is a cloud solution that's fully integrated, and we're seeing that today with FinancialForce ERP on the Salesforce Platform.

**Mark Anderson**  
CEO, OAC Services

**OAC Services**

OAC Services is a world-class consulting firm specializing in cloud and on-premise CRM and ERP implementations. The company focuses in the healthcare, high technology, clean energy industries as well as general businesses.

Before FinancialForce, OAC was dealing with a Frankencloud for an IT infrastructure - using too many disparate solutions that didn't talk to each other (CRM, accounting, MS Project) yet all related to managing services projects. Today OAC is using FinancialForce PSA and Accounting and Salesforce CRM together on the Salesforce platform to get a single view of the customer across sales, financials and services. One cloud has meant powerful reporting along with projects that stay on-track and on-budget.

**Featured Product**

FinancialForce Accounting,  
FinancialForce PSA

**Systems Replaced**

Microsoft Excel; Microsoft Project

**Company Size**

Small

**Industry**

IT Services

**Location**

Campbell, California, United States

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## Business Issues

- Using too many disparate solutions that didn't talk to each other (CRM, accounting, MS Project) yet all related to managing services projects for clients
- Painful to get timely and accurate project data when information needs to be pulled from different systems
- Billing cycles were slow because the information had to be entered and funneled through multiple places
- Group realized they needed a system that could provide one view of all projects and all transactions
- Avoiding an on-premise solution that would be difficult to support and maintain with costly overheads was key
- Found early on that leveraging a single cloud solution for multiple apps would provide them with that one view transaction for all customer data

## Benefits & Results

- Using FinancialForce Accounting and FinancialForce PSA together with Salesforce CRM – all on the Salesforce1 Platform
- One cloud means common reporting, one user interface, one login, one customer record – that spans the front office to the back
- Sales, finance and services teams now have a 360° view of all customer and project activity and transactions so anyone can answer a question regardless of domain
- Employees collaborating more effectively; no more disconnect on project needs or financials
- Red flags are made swifter to make adjustments on a project as needed – whether that's resources, costs, billing, upcoming sales needs, etc.
- Much more responsive and able to follow up on pertinent activities to close deals and keep projects on track
- Team now has the ability to see full project backlog, project billing, any costs on the project, and the non-billable versus billable time
- Project management is better and goals are achieved
- Decisions are made faster and smarter
- OAC operating more efficiently which in turn has allowed them to grow and maximize profits
- Weekly process to collect timesheets, get them approved and generate invoices dropped from three days to just a day – a 66% improvement

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**Mark Anderson** | CEO