

Idox enables a game-changing experience for its professional services group and customers



Industry: Computer Software

Company Size: Medium

Headquarters: Theale, Berkshire, UK

Products Used: FinancialForce Professional Services Cloud

Key benefits:

- ✓ 1 source of truth for customers and colleague
- ✓ Enhance customer collaboration
- ✓ Improve internal staff coordination



“The FinancialForce team took the time to understand our vision and we developed a trusting relationship with the team. FinancialForce PS Cloud will help us realise our multi-year growth plans to deliver the highest levels of customer and staff experiences. I wanted to enhance customer collaboration so it is at the heart of everything we do, and the FinancialForce solution will make that happen.”

Matthew Salter
Professional Services Director
Idox

Take the Customer and Colleague Experience to the next level

Since its foundation in 2000, Idox has developed a range of robust processes to run its business adding best-of-breed systems to support key functions as the need arose. Professional services is the last component moving to an integrated tool to bring all operations under a single solution. The team of over 100 spent over 65% of its time collaborating within the business and with customers delivering services to over 500 customers across the world. Idox wants to standardize its professional services as it had done with other areas of its business to ensure the highest levels of efficiency and quality of service. While the potential to improve was clear, finding a trustworthy partner was key to acting on this vision.

After reviewing the market, the company selected FinancialForce PS Cloud to take its professional services group into the future.

Streamlining and automating processes

For the first time, Idox is able to automate core tasks for its professional services team. With key project information automatically flowing into and out of FinancialForce PS Cloud, Idox has brought its professional services organization in line with the other standardized areas of its business.



Empowered with a golden record

Seamless integration between FinancialForce PS Cloud and the company's Salesforce instance provides a single, consolidated view into projects and customers. This enables Idox to achieve its 360-degree view and deliver a fantastic experience for both staff and customers. At the same time, FinancialForce PSA Communities is a differentiator and a game-changer in terms of the service it delivers.



Better harnessing internal resources

With FinancialForce PS Cloud, Idox's project managers can focus on customer experience, timely project delivery, colleague collaboration, proactive change and achieving business growth targets. By empowering its professional services team with more flexibility and control over the way they manage and deliver projects, Idox will free time for all of its delivery staff for them to focus on other value-added activities, including personal development.

Name	Status	% Availab...	Rank	Resource ...	Region	Practice	% Utilizat...	Mailing City	Default C...
<input type="radio"/> Tim Marklein		59	1	Consultant			85.00	Portland	USD 85.0
<input type="radio"/> Preston Mayo		91	2	Consultant			85.00	Oakland	USD 85.0
<input type="radio"/> Samantha Lewis		6	3	Consultant			85.00	San Mateo	USD 85.0
<input type="radio"/> Doug Douglas		5	4	Consultant			95.00	New York	USD 95.0
<input type="radio"/> Lisa Medley		81	5	Consultant			85.00	Seattle	USD 100.0
<input type="radio"/> Pam Practice		71	6	Consultant			95.00	Tampa	USD 75.0
<input type="radio"/> Jim Hilligoss		79	7	Consultant			85.00	San Mateo	USD 85.0
<input type="radio"/> Ed Smith		9	8	Consultant			85.00	London	GBP 95.0
<input type="radio"/> Anne Brogan		4	9	Consultant			95.00	Manchester	GBP 125.0
<input type="radio"/> Brad Tan		-33	10	Consultant			85.00	Sydney	AUD 65.0
<input type="radio"/> Pjotter Pitka		50	11	Consultant			85.00	Rotterdam	EUR 140.0
<input type="radio"/> Ahmet Arva		50	12	Consultant			85.00	London	GBP 110.0

Confidently pursuing growth

The solution aligns with Idox's growth plans and empowers it to deliver the staff and customer experience that drives customer acquisition along with retention of existing customers and top professional services talent.

Learn more

www.financialforce.com