

Efficio Harnesses FinancialForce to Create a Flexible, Cloud-Based Platform for Business Growth

efficio

Industry: Consulting and Technology

Company Size: Medium

Headquarters: London, UK

Products Used: FinancialForce ERP Cloud and Professional Services Cloud

Key benefits:

- ☑ One-click reporting
- ☑ Real-time revenue forecasting
- ☑ 360-degree customer visibility



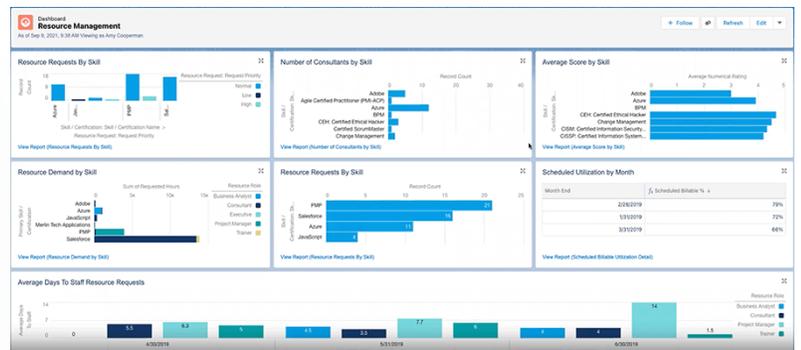
Enabling New Ways of Working

Efficio has specialised in procurement and supply chain management for more than 20 years, supporting clients across the globe from 13 offices in Europe, North America, and the Middle East.

It takes a technology-driven approach to help organisations optimise costs, improve internal processes, and upskill their in-house teams so that they can deliver greater sustainable efficiencies.

“The power of FinancialForce, purpose built for the Salesforce platform, enabled us to stay connected while growing rapidly and expanding internationally.”

Peter Heit
Director of Operational Finance
Efficio



Outgrowing Processes and Software

Like many fast-growing organizations, Efficio experienced pain due to disconnected front- and back-office operations, and reliance on spreadsheets and legacy accounting software. Time-consuming routines, cumbersome workarounds, and lengthy meetings failed to provide needed visibility across the company's global regions. As a result, project cost control was challenging, and headcount planning was a headache. Dedicated resources spent considerable time each month to produce business reports.

Resolved to transform its operations in a customer-centered way, Efficio partnered with FinancialForce to power a platform for growth.



Streamlining operations

FinancialForce ERP Cloud and Professional Services Cloud perfectly complement Efficio's Salesforce utilization, enabling the company to use Salesforce as its core operating platform. With a single source of truth fed by accurate, up-to-date data, leadership has a better, clearer, and more comprehensive picture of operations and resources. Plus, by centralizing project management, the company empowers managers to make informed decisions to better manage performance and profitability.

Improving processes and collaboration

The user-friendly platform helps employees produce financial and operational insight reporting with the click of a mouse and collaborate around shared customer and financial information. Now that teams trust the numbers and are aligned, meetings are more productive.



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Pin Compare Manage Schedule Hold Assign											
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		
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<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		
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<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		

Unlocking business efficiencies

Efficio has unlocked huge business efficiencies by freeing employees across the organization from manual tasks, while realizing stronger controls from sales opportunity to revenue reporting. The new platform has also powered a culture change that promises to transform the company's future. Gaining a true picture of the business is enabling Efficio to better track and report on its sustainability and financial metrics.

Powering Impressive Growth

Efficio's digital transformation project has enabled it to automate and simplify routine tasks, ensure information flows rapidly, increase efficiency, and reduce costs. The company now has an accurate view of revenue forecasts, complete control over customer-facing projects, and better pipeline visibility. In the year ending June 2022, the company grew faster than ever, achieving sales growth of 35% and expanding headcount by 27%. Implementing FinancialForce will enable Efficio to continue scaling, expand internationally, and flex around remote working patterns long into the future.

Learn more

www.financialforce.com