



Document Sciences

www.docscience.com



At A Glance:

- **Company:** Document Sciences
- **Location:** Carlsbad, CA
- **Industry:** Software
- **Challenges:**
 - Needed better visibility into the sales pipeline
 - Needed better integration between accounting, sales and customer interactions
- **Software switched from:** MAS 200, Clarify, Microsoft Excel and Access, homegrown applications
- **Other software considered:** Salesforce.com, Epicor
- **Results with NetSuite:**
 - Established a transparent sales pipeline, leading to improved sales
 - Lower IT costs



“Before NetSuite we would have to go through three different spreadsheets to establish what exactly was happening in our global sales pipeline.”

— David Barker, Director of IT

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The Results: Accountability in Sales

With a clear view of the sales pipeline, sales activity tracking has definitely improved over the time period in which NetSuite was implemented, says David Barker, Director of IT.

Also, the company has saved significantly in IT costs by substituting NetSuite for Clarify in the support organization. “Clarify was difficult and expensive to maintain,” Barker says. “We paid more to support just 45 users of our old Clarify system than we do for the entire NetSuite package that we have rolled out to 130 users.”

The Challenges: Line By Line

As an enterprise software developer that enables financial institutions to create and automate the delivery of regulated communications, Document Sciences occupies a very specific niche: prospective customers could include insurance companies that want to speed delivery and improve accuracy of policies and proposals to insurance agents, large regional bank systems that want to generate mortgage loan documents, or a broker that needs customer-specific marketing prospectuses.

Unfortunately, because it had no central sales force automation system, the company had little visibility into these diverse sales activities. “We were using Excel spreadsheets and an Access database,” Barker says. “These would get updated by different managers at different points in time. Prospective deals could easily be ‘lost track of’ from these spreadsheets, thus hindering our ability to correct the sales processes when needed. If we wanted to track a particular deal we had to follow the item line by line from the previous spreadsheet.”

Another problem was duplicative customer data, he adds. “Customer information was entered into the sales pipeline tracking database, as well as in our order processing database, in our MAS 200 database and then once again, in our Clarify service database.” In short, he says, “it was a different customer record depending on whose view you were using.”

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“We were about to sign up with Salesforce.com, when I came across NetSuite. I found that it had far more functionality—with the accounting and financials—and at a much better price point.”

— David Barker, Director of IT

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A lack of data and systems integration between accounting, sales, order management and customer service was also a problem. This made it difficult and time consuming to identify high revenue clients, or to track software deliveries to customers.

Most importantly, upon leaving the organization, many sales reps would take their contact data with them, leaving Document Sciences with partial records. “Unfortunately, there was no central repository for the sales information, so it was easy for such things to happen.”

The Search for a Solution

At first Barker did not expect to find an integrated solution that would connect these disparate business processes. “I was about to sign with Salesforce.com even though they only offer CRM. Then I found NetSuite, which offers accounting as well—and at a lower price point.”

Document Sciences has been using NetSuite’s CRM, including sales force automation, for a year. The company is set to implement the service module and will complete the rollout of the accounting system in the near future.

“We are gradually replacing the spreadsheets we had used as we gear up for a complete rollout.” For example, Document Sciences is still using an Excel spreadsheet to track billing for maintenance, but will discard it once NetSuite’s accounting module is up and running. “MAS 200 doesn’t offer that particular feature,” he says, “but NetSuite does.”

The Solution: Seamless Information Flows

From its initial implementations of NetSuite for CRM and SFA, Document Sciences has already realized greater efficiencies. “There is greater accountability in sales now,” Barker says. “There have also been substantial improvements in our operations because of the implementation.”

For example, the company has been able to identify new sales and customer reference opportunities by having an integrated customer database. “We are doing a better job of capturing data now, which means we can start looking for new sales opportunities within our customer base.” Also, because the company has gained a better understanding of exactly how its customers are using its products, it has been able to offer prospective customers much better references—an invaluable sales tool.

“One of the constructs I created using NetSuite’s Custom Record helps me easily identify examples of very specific product usage. So if I want to find a company that is using our software to run booklets on an IBM zSeries platform, all I have to do is run a quick search.”

Barker points to the system’s Dashboard as the perfect illustration of the efficiencies the company has gained since it went live with NetSuite. “The metrics, which can be tailored for each division, give management much better visibility into our operations. Before it was difficult enough to just gather the data—much less gather it in one place. Now, not only do we have all the necessary information, but we can customize its presentation according to our needs and view it in real-time.”

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