



## Helio Solutions

[www.heliosolutions.com](http://www.heliosolutions.com)



### At A Glance:

- **Company:** Helio Solutions
- **Locations:** Santa Clara, San Jose, San Francisco, and Los Angeles, CA; Phoenix, AZ
- **Industry:** Computer Hardware; Computer Services
- **Challenges:**
  - Sun Microsystems' largest West Coast technology integrator had outgrown entry-level accounting and CRM solutions
  - Reporting and forecasting were cumbersome and time-consuming
  - Poor access to real-time financial data and customer trends
  - Sales and marketing teams had no central repository of data
- **Software switch from:** Peachtree; proprietary CRM
- **Other software considered:** SAP, Salesforce.com, custom development
- **Results with NetSuite:**
  - Management enjoys effortless, real-time pipelines and custom reporting
  - Sales, marketing and support staff have improved efficiency with deal control and order status
  - Saving four full-time employees (15-20 percent of support staff)
  - Company revenue increased from \$53 million to \$88 million



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Helio Solutions

### The Results

By adopting NetSuite to manage its back-office and customer-facing operations, Helio Solutions has been able to preserve its fast-track approach to building business. NetSuite has also brought Helio the peace of mind that comes with knowing the company won't outrun its ability to analyze trends or serve customers.

By breaking down the considerable barriers Helio once faced in its reporting and business intelligence capabilities, the company now has clear insight into revenue and profitability. “NetSuite has given us a much more accurate view of what customers are buying and aren't buying from us, as well as what our professional services attach rates are,” says Bert Condensa, executive vice president of sales and marketing for Helio. “These things are important to us, and it's important that we are able to do them in real-time.”

Because order processing and management are processed through NetSuite, sales and customer service personnel have faster insight into order status, reducing lead times and improving the speed and quality of the support process. In all, NetSuite has given Helio the tools it needs to keep its business growing. “From 2003 to 2004 we went from \$53 million to \$88 million, and for 2005 we are forecasting another double-digit sales increase, and NetSuite is a key ingredient,” Condensa says. “I would need an incremental 15 to 20 percent support staff if we were still running on the older system, especially to get the reporting information I am getting now with NetSuite.”

### The Challenges

Helio Solutions has grown quickly, from its inception in 2001, to become the leading provider of high-end data center solutions using Sun Microsystems platforms—and consequently, Sun's largest partner on the West Coast. Success caught up with Helio rather quickly, however. “When the business started in 2001, we were using a basic accounting

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system, and when we had only 12 employees, we were okay,” Condensa says. “But as we added headcount and sophistication and wanted to get more robust in our CRM capabilities, we knew we needed to make a change.”

Obtaining detailed reporting information was next to impossible, particularly with any sense of urgency. “I had to give advance notice to accounting if I was looking for sales by customer, which was completely ridiculous,” he says.

Meanwhile, Helio’s ability to manage complex negotiated deals was not as strong as the company wished. Revisions could too easily become slowed down or fall out of sync, impeding the deal process, and there was no central sales and customer database shared throughout the sales, marketing, and service organization. “We had been running our CRM through individual contact managers and quoting deals in Excel Spreadsheets, so we knew that needed to change.”

### The Solution

Helio’s deployment of NetSuite to all 60 of its employees has helped the company bring order to its fast-growing operations. The improvement in sales and marketing mean that Helio is targeting the right customers at the right time, and closing intricate deals with less hassle and waste. “We’re not making as many mistakes in terms of writing up an estimate and converting it to an order,” Condensa says.

With everything from accounting and sales to HR and timecards managed through NetSuite, the vast reduction in manual processes has freed up a number of administrative resources for other tasks, and given the company room to focus on new areas of growth. Helio is soon to explore direct B2B reseller relationships via the Web and NetSuite.

NetSuite’s CRM capabilities are being used to make changes in Helio’s sales and marketing campaign process, unifying customer databases and ensuring that the company stays on a steady course of success. “Now we know how many of our customers leverage a certain type of solution, and we can tell who is a profitable customer, and who is not.”