

CASE STUDY

Unifying acquired business systems and automating insights at Precisely

How Big Data leader Precisely integrated the business systems of a newly acquired company and automated data-driven insights, starting with the Order-to-Cash process.

Company

Precisely is a market leader in data integration, clarity, and sorting, providing data integrity to over 12,000 customers, including 90 percent of the Fortune 100.

The challenge

Precisely - previously known as Syncsort - was struggling to integrate newly acquired business systems born from mergers and acquisitions into the company's existing tech stack. Precisely data architects complained that their current tool, Dell Boomi, had poor connector support, a difficult UI, and lacked general support, making data projects difficult. Team leads also stated they weren't confident about using the platform to integrate the numerous newly acquired business systems resulting from the recent purchase of Pitney Bowes' software solutions business segment.

Dave Shuman, Sr. Director of Data Operations & Enterprise Architecture at Precisely, had been hitting roadblocks with Boomi and decided to evaluate other platforms since they were nearing the end of their contract with Boomi. Shuman felt it was crucial to find something that could solve for their current constraints around poor data unity, especially within the Rev Ops area, but also handle integrating the newly acquired business systems.

The challenge (continued)

Additionally, Precisely knew they could move beyond simply managing data integrations to the actual automation of core data workflows. They also wanted to automate the organization's order-to-cash process, which had very low transparency and required a significant amount of hands-on work to create reports and derive insights. However, they were never able to strategize on automation because they were too busy trying to expand Boomi's integrations in order to make things work.

Precisely's approach:

Precisely wanted to identify and leverage a platform that could consolidate their business systems, especially disparate SAP instances, and automate data flows to Netsuite and Salesforce, while providing a workbench via Microsoft Teams. The result would be an automated order-to-cash process with high visibility, as well as a unified and standardized single source of sales and customer data.

A P P S :



The solution:

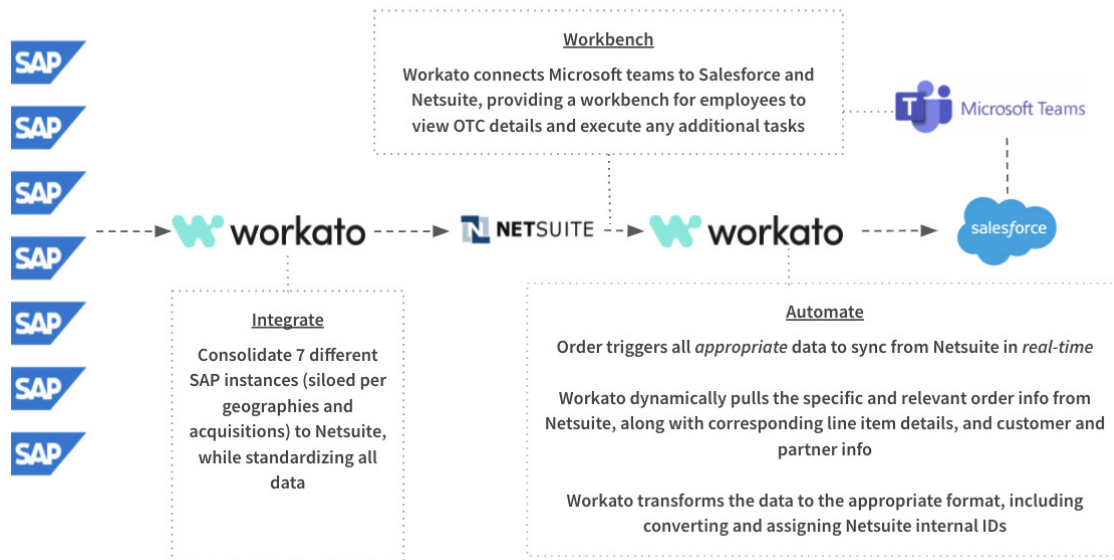
After researching Workato and demoing the platform, Shuman and his team were excited by the platform's intuitive UI that provided "greater ease-of-use, enabling a broader range of developers/users." Additionally, the Precisely team felt that the out-of-box connectors and connector support would provide ease of deployment and expertise if and when hitting any technical issues.

"Boomi isn't intuitive, which caused problems down the line, especially with connectors. We needed to consider alternatives."

Dave Shuman, Precisely Sr. Director of Data Operations & Enterprise Architecture

The solution (continued):

Shuman and his team decided to deploy Workato. Using Workato's out-of-box connectors, they quickly consolidated the data from 7 disparate SAP instances (born from acquisitions and varying geographies) into Netsuite and Salesforce, providing unified, comprehensive, and standardized data. The team went on to automate the flow of data and establish a workbench for the Rev Ops team where they could create automated reports - including ones specifically for their order-to-cash process - providing transparency and intelligence that wasn't possible before.



The impact:

- ✓ All data is accounted for and accessible. No more piecemeal data, blindspots, or manual data queries.
- ✓ Consolidated 7 different SAP instances to a single and uniform data source
- ✓ Fully automated order-to-cash cycle with high visibility
- ✓ No more reliance on seasoned engineers when architecting data
- ✓ Automated data-driven insights

“It was my personal hands-on experience with Workato that really did it for me. I found that things are easy to do, like how to wire this up to SFDC. I really enjoyed seeing the easy out-of-the-box capabilities - that was extremely powerful.”

Dave Shuman, Precisely Sr. Director of Data Operations & Enterprise Architecture