

Headspace Streamlines Sales and Billing with Salesforce-NetSuite Integration App

Customer
Headspace

Product
Salesforce-NetSuite Integration App

About About Headspace

Headspace has a mission to improve the health and happiness of the world with an online platform for providing people the benefits of meditation anytime, anywhere. Millions of users, in more than 190 countries, use their app to access guided meditations, animations, articles, and videos.

Background

Early last year the sales team at Headspace adopted Salesforce as their customer relationship management (CRM) platform while the finance team brought in NetSuite as their enterprise resource planning (ERP) system. When Nicole Punelli joined as the Sales Finance Manager, she immediately recognized the burden of having sales and finance manually re-entering data into the two separate applications. In addition to time spent on data entry, the manual activities opened the door to human-errors that led to longer billing and reconciliation cycles.

The Challenge

Headspace had been growing rapidly, and Nicole knew that the finance team was not in a position to handle the increase in the manual duplication of data between Salesforce and NetSuite. Since each business unit is responsible for finding and implementing their own software solutions, if Nicole wanted to integrate Salesforce and NetSuite, she was going to have to have to do it herself.

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The biggest pain point for Headspace was that every entry in Salesforce had to be re-entered in NetSuite. Celigo completely eliminates the duplication of work and inevitable errors, saving us 15 hours a month.

— **Nicole Punelli**
Sales Finance Manager
at Headspace

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Web Site
www.headspace.com

While Nicole was an expert in Salesforce and understood the platform well, she had minimal experience with NetSuite, meaning she needed to find a vendor that could provide the NetSuite expertise for making sure the integration met Headspace's immediate and ongoing requirements. Additionally, she wanted an integration platform that was just as easy to use and manage as was Salesforce.

One of the biggest challenges Nicole thought she would face was finding an integration solution that would support the Salesforce Orders object which is not a common object used by other companies.

And, on top of everything, she needed the integration done fast.

The Solution

Nicole needed a platform that was fast to implement, intuitive and easy-to-use, and one that would not only sync Salesforce and NetSuite's common integration flows, but one that would also support Salesforce Orders integration.

Nicole heard about the Celigo iPaaS integration platform from co-workers, and once she saw the demo, she felt that it was the best solution for her needs. She liked the fact that Celigo offered a prebuilt integration between Salesforce and NetSuite that supported Salesforce Orders as part of the out-of-the-box integration flow. Additionally, Celigo provided the NetSuite expertise that was crucial for the successful implementation.

"I know Salesforce well, but not NetSuite and the Celigo project managers were really helpful in providing insights into getting the connections to NetSuite in place," said Nicole. "It was a smooth process."

Nicole does not have a background as a developer or software engineer, but she finds that Celigo is as easy-to-use as she had hoped. "Celigo is an intuitive tool," said Nicole. "I don't have the experience of a developer, but I can jump into integrator.io and easily make changes myself without having to consult IT. I love it!"

The Bottom Line

With the Celigo Salesforce – NetSuite Integration App in place, manual duplication of data was completely eliminated. Since only the Salesforce data entered by Sales reps needed to be validated, there was no need to manually review each sales contract, improving overall accuracy and having to spend less time on billing. Nicole estimates that the Salesforce to NetSuite integration saves the finance team about 15 hours per month; this is time that they can now spend on other projects.

And, for Nicole, Celigo is now allowing her to do her real job. "The Celigo integration has allowed me to do the job that I was hired to do – strategic planning, quota setting, sales structure, and compensation – rather than on invoicing and billing," said Nicole.

An unexpected benefit of the Celigo integration was business process improvements. The integration project forced Nicole and her team to re-validate and re-adjust their current workflows. As a result, they made improvements to make sure their sales and billing processes had the scalability to meet Headspace's rapid pace of growth.

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About Celigo

Headquartered in San Mateo, Celigo is pioneering the future of application integration. Celigo's SmartConnectors™ are prebuilt integrations that connect independent SaaS applications together seamlessly. These connectors are backed by the integrator.io, an easy-to-use integration middleware platform for building custom integrations.

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