

How **Perfect Keto** increased process efficiencies and data-driven decision-making with Celigo's integrator.io

Customer
Perfect Keto

Segment
B2C eCommerce / Health & Wellness

Product
integrator.io
Amazon - NetSuite Integration App
Shopify - NetSuite Integration App

About

Perfect Keto produces clean, effective supplements that make it easier to stick to the keto diet and get results faster. They also offer a resource center to help educate those who are interested in trying the keto diet.

Background

Founded in 2016, Perfect Keto achieved an exponential growth in sales of over 600% within their first couple of years in business. When they started out, their business was hosted on Amazon and Shopify storefronts, while managing their financial transactions manually with QuickBooks. They were also using Skubana, an inventory management system that served as a means of counting inventory between their eCommerce platforms and 3PL fulfillment warehouse.

The Challenge

Perfect Keto was thrilled that their success far exceeded expectations, but this also meant that they were facing some significant growing pains. Despite the fact that they had grown over 600%, processed thousands of orders per day, and managed 70-100 SKUs depending on the promotions they were running, every part of the order-to-cash process was performed manually as it had been when they first started. Transactions had to be exported manually from each of their two storefronts. Their inventory management system was notoriously unreliable in syncing data from their eCommerce storefronts to their thanks to constant lags and errors, which

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With Celigo, our accounting team got back 10 to 15 days a month that was previously spent on manual tasks. We're also seeing a cost savings of at least three or four grand a month that we previously spent on contractors performing manual financial processes.

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— William Palmer
Director of Finance
at Perfect Keto

PERFECT KETO

Web Site
www.perfectketo.com

meant that they couldn't trust their inventory reporting.

All of these problems resulted in what William Palmer, the Director of Finance at Perfect Keto, could only charitably describe as “a slow-motion, snail's pace close process.” William wanted to focus on forecasting cash flow and product demand planning to inform future business decisions, but this was impossible when disjointed systems forced them to play catchup with manual processes. The inability to get accurate reporting in a timely manner meant that William and senior stakeholders at Perfect Keto were essentially flying blind when planning for each month and quarter.

The Solution

Perfect Keto adopted NetSuite for their finance and inventory reporting to replace Quickbooks and Skubana. However, to truly resolve their problems with data integrity and tedious manual work, they needed an integration solution that would offer transparent error handling and automated data syncing in real time.

William chose Celigo's integrator.io based on its reporting capabilities, streamlined error handling, and strong support for Perfect Keto's ecosystem of NetSuite, 3PL, and external storefronts. On top of offering a solid iPaaS, Celigo's consultants made sure that the implementation was customized to Perfect Keto's needs. “The way we handle discounts, promos, pricing and bundling required a lot of scoping and communicating use-cases,” William said. “The Celigo team was super helpful and knowledgeable when we needed tweaking and customization. They configured the technology we were launching to make our goals and vision a reality.” Perfect Keto's transition to their newly integrated systems went without a hitch, despite the fact that they went live during the holiday season - their busiest time of year.

“When we started seeing the automation and all the live data flows integrating with NetSuite, it was a huge ‘We did it!’ moment from our perspective,” William commented as to his reaction to the implementation going live. Orders are automatically synced between their Shopify and Amazon storefronts, and their 3PL warehouse with complete visibility into inventory levels. As Celigo now acts as a centralized repository for all of Perfect Keto's data, they were able to capture so much more information that they weren't able to previously: sales, discounting, promotions, cost calculations, shipping, and fulfillment. The drastically increased turnaround and improved reporting gave William's team greater visibility (and control) over their cash. “Before Celigo, we closed 30 days after the fact,” William remarked. “If we discovered we missed sales forecast or were over budget on spend, it was too late to make an operational pivot based on that information. We're now able to answer the questions ‘How are we performing against sales targets?’ Is spend tracking within budget? and make data driven decisions in real time.” A faster closing time means that they have accurate data to act upon sooner, without any surprises.

Bottom Line

As a direct result of using integrator.io, Perfect Keto was able to successfully reduce closing times by two-thirds; gave their controller 15 days per month back to work on projects with better returns; and saved thousands of dollars from hiring contractors to perform manual data entry. Thanks to the significant improvements in efficiency and reporting brought on by Celigo, William's finance team now spends most of their time on high-value, strategic initiatives like forecasting cash flow and demand planning. “Now I have comfort knowing we have real time data integrity to keep our hand on the pulse of the business and maintain a proactive, instead of reactive, view of our operations,” William said in relief.

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Celigo freed up a ton of time for me to focus on forecasting our cash flow going forward and eliminate all the surprises. It also got rid of a lot of the tedious, manual grunt work so we could work on the high-return, value-added strategic work that a finance department should be focusing on.

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— William Palmer
Director of Finance
at Perfect Keto

About Celigo

Headquartered in San Mateo, Celigo is pioneering the future of application integration. The Celigo integrator.io is the next-generation iPaaS that allows you to quickly connect any cloud application, automating business processes and eliminating manual data entry and exports across applications.

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