celigo

ZoomInfo saves over $200,000 per year with big help from Celigo

Customer
ZoomInfo powered by DiscoverOrg

Product
Integrator.io
Salesforce-NetSuite Integration App

About

ZoomInfo powered by DiscoverOrg helps go-to-market teams accelerate growth with the most accurate company and contact data on the market with a suite of tools to ensure continued growth and success. High-growth companies use ZoomInfo to identify business opportunities, connect with decision-makers, and go to market with confidence.

Background

Dave Witty, Director of Financial Systems at ZoomInfo, was tasked with building ZoomInfo's finance and accounting system with a focus on automation, using NetSuite as the backbone of ZoomInfo's financial systems. "I envision NetSuite as the iPhone of our systems. You buy the base and then you cater it to your needs by adding integrated third party applications," said Dave. ZoomInfo's finance stack features over a dozen such third-party applications which, when integrated with NetSuite, essentially run the organization.

The Challenge

ZoomInfo is one of the fastest growing SaaS companies in the world. However, their financial systems were struggling to keep up with this growth, which threatened to act as a barrier to the company's boom.

The core issues that needed to be addressed were numerous. For

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> Celigo was instrumental in helping us fully automate our order-to-cash process. Automating our transactions from Salesforce prevented us from having to hire an additional *five* full time employees. Reducing the need for paper processing has even allowed us to seamlessly transition to a work-from-home policy.
>
> — **Dave Witty**
> Director of Financial Systems at ZoomInfo

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example, most processes (such as inputting sales orders) were done manually. There were numerous delays: it could take 10 days to process transactions after closing. To keep up with ZoomInfo's growth, Dave was on the brink of hiring an entire team to handle these processes, which also risked magnifying his issues with inaccurate data entry.

Inaccuracies stemming from manual data entry also frequently cause all kinds of problems. "Every month, the revenue team had a tedious process to come in and fix all the data issues," Dave explained. "It was a nightmare!" Some DIY integrations existed, but they weren't implemented effectively. ZoomInfo needed to find a way to scale their financial systems quickly and automate as much as possible, or risk obstructing their growth because of these process limitations.

The Solution

Dave was brought in to address these finance and accounting systems issues with a focus on automation, specifically by integrating the finance stack around NetSuite. He started with Salesforce, which affected the most mission-critical processes and featured significant data issues.

Implementation took special care due to the complexity and heavy customization of ZoomInfo's systems, but Celigo's expertise and the power of iPaaS were more than up to the challenge. "The Celigo integration specialist we worked with understands NetSuite, Salesforce, and integrator.io," Dave said. "It's rare for an integration specialist to not only understand their own product, but also the systems we're integrating with." Whenever he had a problem, Celigo's integration specialists knew exactly what to do. The end result was a Salesforce integration that brought in sales data enriched by ZoomInfo's own platform into NetSuite, automating sales order processing.

After the integrations were deployed, ZoomInfo achieved operational transformation that extended beyond mere data processing. "Celigo integrations self-manage themselves," Dave commented. "With Celigo, our organization was able to identify ways to modify our business processes to meet how the software was designed."

Bottom Line

After ZoomInfo deployed their integrations with Celigo, a single person could process **6 times more sales orders a day with over 99% data integrity** -- all without needing to hire a new team. Dave calculated that Celigo saves him **over $200,000 per year** just on processing sales orders. He is exploring other Celigo products to help him save even more money, such using the Cash Application Manager to automate the matching of invoices to customers. For these reasons, he considers Celigo to be a critical part of his tech stack.

> At ZoomInfo, we only implement scalable, automated 3rd party solutions. Celigo is the #1 most significant point of automation in our fintech stack. It's allowed us to to manage the OTC process with one single person, even as our transaction volume has grown by 358%.

> — **Dave Witty**
>   Director of Financial Systems