

# Forum One Eliminates Departmental Data Silos with Celigo

**Customer**  
Forum One

**Product**  
OpenAir-Salesforce Integration App  
Integrator.io for custom integrations

“

There are fewer mistakes being made because we're getting the right source data – so the integrity of the projects is better. And, people are very happy with it.

— **Jeff Traynor**  
Solutions Architect,  
Forum One

”

## About Forum One

Forum One is a full-service digital agency specializing in web design and development, branding, strategy, and analytics. For twenty-one years, their teams of digital strategists, architects, designers, and creators have helped leading nonprofit organizations and government agencies, including American Red Cross, Peace Corps, Robert Wood Johnson Foundation, and the U.S. Department of Agriculture.

## Background

Forum One was looking for a new professional service automation (PSA) system. The tool they had been using was constantly breaking, and there was a clunky integration between it and Salesforce which required significant manual labor.

While evaluating a PSA tool, OpenAir, Forum One identified Celigo as a partner to work with.

## The Challenge

Over time, Forum One had acquired various applications to serve individual departments' specific needs – including Salesforce by the sales team – with little thought given to integrating these applications. This lack of integration led to valuable information being held in data silos where it could not be shared between systems and departments without significant manual labor.

**FORUM ONE™**

Web Site  
[www.forumone.com](http://www.forumone.com)

Jeff Traynor, Solutions Architect at Forum One, had worked for other organizations with similar challenges and understood the critical need for integrated applications. So, finding an integration solution that could easily connect Salesforce with their new PSA system was top of mind for him.

“As we were looking at OpenAir, we came across Celigo’s OpenAir – Salesforce Integration App,” said Jeff Traynor, Solutions Architect at Forum One. “We decided to move forward with OpenAir because we had so many productive conversations with the Celigo team and they proved to me that the integration offered by Celigo’s OpenAir – Salesforce Integration App was solid.”

## The Solution

When the OpenAir – Salesforce integration was complete, Jeff and the Forum One team began seeing the benefits almost immediately. Now, whenever a sales opportunity is closed in Salesforce, a new project is immediately created in OpenAir. Key project information, such as billable hours, percentage complete, and other data, is now available directly within Salesforce. The ability to easily sync information between OpenAir and Salesforce has cut down on a considerable amount of manual labor for Forum One and ensures that the data between the two systems is always consistent and up-to-date.

Forum One also values the fact that Celigo makes it easy for non-technical employees to customize fields and data mappings. “The stakeholder who is primarily responsible for the OpenAir – Salesforce integration is an entirely non-technical person,” said Jeff. “But with Celigo, she can add new connections, create new custom fields and map the information over to Salesforce, all through the platform.”

As Jeff and his team were working with Celigo, they started thinking about other integrations with OpenAir that might be beneficial. “The integration between Salesforce and OpenAir opened our eyes to additional possibilities,” said Jeff. “Thanks to Celigo, we started to see OpenAir as the central source of truth for data within the organization.”

Case-in-point: The Human Resources department acquired a tool called BambooHR, but because both the HR and the Project Delivery teams needed access to time-off requests for project team members, the two systems had to be integrated. Jeff spoke with Celigo about the issue and his account manager introduced him to the capabilities of integrator.io. With integrator.io, Jeff was easily able to connect key integration flows between BambooHR and OpenAir, keeping both the HR department and the head of project delivery happy. Jeff now knows that as departments add new apps, he can continue to easily integrate them with OpenAir using the Celigo integrator.io platform.

Jeff plans a similar project connecting Jira to OpenAir in the near future.

## The Bottom Line

Because of Celigo’s pre-configured and proven integrations between OpenAir and Salesforce, Forum One can now automatically sync information between the systems with little or no manual effort, freeing up resources for other projects, and ensuring that the information is always consistent and up-to-date.

“The Celigo integration is a benefit to everybody,” said Jeff. “There are fewer mistakes being made because we’re getting the right source data – so the integrity of the projects is better. And, people are very happy with it.”

As they continue to add applications, Forum One also discovered they can use Celigo integrator.io to ensure important data is never stranded in a silo with no easy way to sync it with other platforms. This allows everyone to continue using the tools they are comfortable with while giving them the information they need, without creating unnecessary bottlenecks or manual work.

“Our HR department likes using BambooHR, our project management team likes using Jira,” said Jeff, “and because of the Celigo integrations, each team will be able to continue using their apps for day-to-day activities, while allowing us to leverage the reporting and data management capabilities of Open Air. That’s a major benefit to everyone at Forum One.”



“We decided to move forward with OpenAir because we had so many productive conversations with the Celigo team and they proved to me that the integration offered by Celigo’s OpenAir – Salesforce Inegration App was solid,”

— **Jeff Traynor**  
Solutions Architect,  
Forum One



## About Celigo

Celigo’s integration solutions enable applications to work together as one. Celigo integrator.io is a powerful and intuitive iPaaS platform that enables both technical and non-technical users to synchronize data, automate processes, and streamline operations by integrating any applications and data sources.

## Contact Us

1820 Gateway Drive, Suite 260  
San Mateo, CA 94404, USA  
Email: [sales@celigo.com](mailto:sales@celigo.com)  
[www.celigo.com](http://www.celigo.com)

CS-FORUMONE-0719