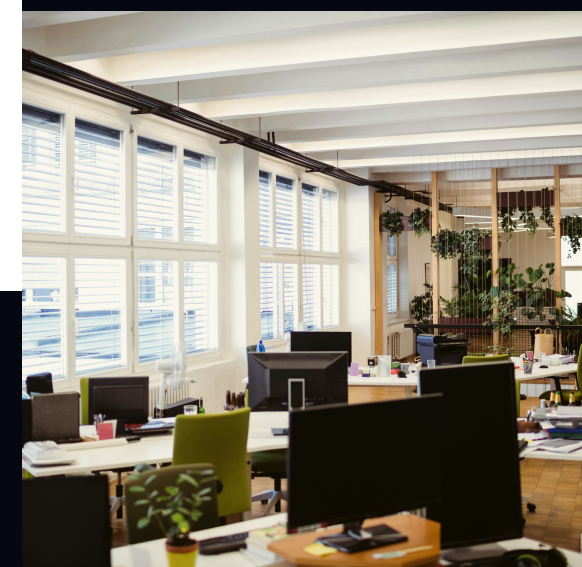


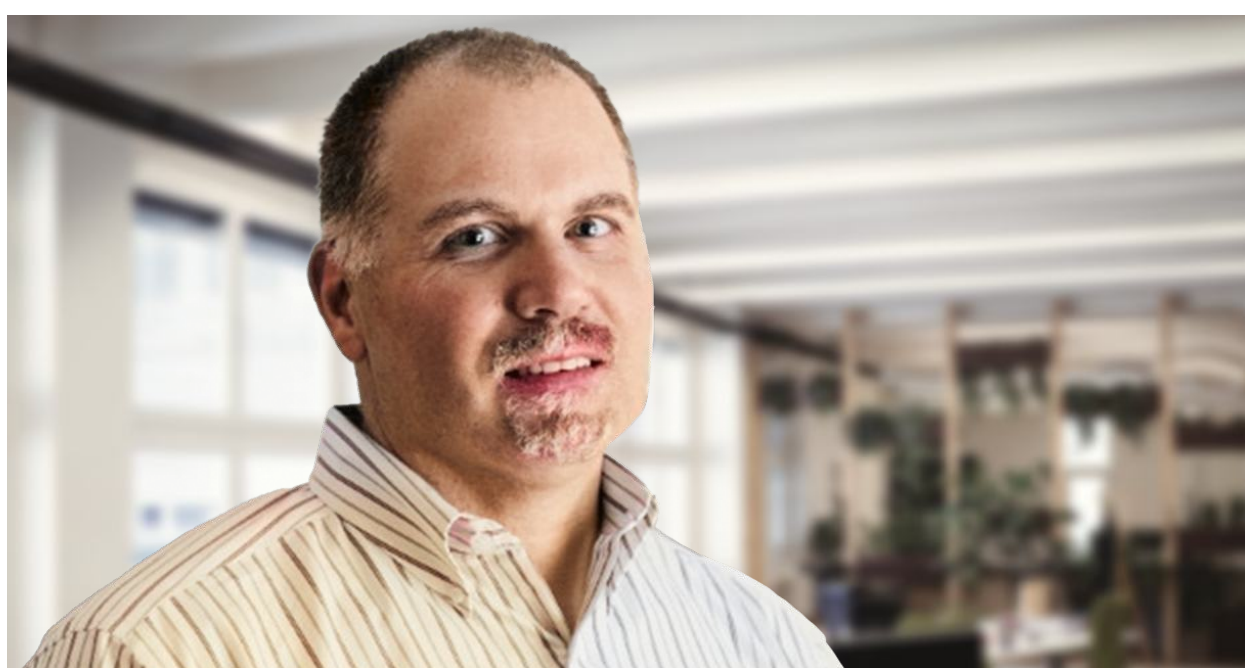


Integrating altaFlow into Salesforce Consulting Service: altaFlow-OMI Partnership

altaFlow-OMI Partnership



Customer Profile



Paul Sciandra

COO & Head of Professional Services Practices at OMI

OMI (Outsource Management Inc.) OMI (Outsource Management Inc.) is a go-to resource that helps primarily (but not exclusively) mid-sized companies implement and integrate various SaaS solutions into their business workflows.

Key areas of expertise: CRM systems, marketing automation, account-based marketing, sales process automation, the list goes on. With over 20 years of experience on the SaaS market, OMI provides consulting for businesses looking to make the most of their Salesforce stack, Dynamics 365 stack, and now airSlate.

OMI's story stands out as an example worth emphasizing because their team not only consults with other people on how to implement altaFlow — they are using airSlate in their internal processes. And who is a better software consultant than an experienced user?

How OMI uses altaFlow internally

Before the introduction of altaFlow, opportunities and quotes needed to be transferred manually before they could become sales orders.

airSlate helped with consolidating several smaller processes into a single, unified Sales workflow. Once contract negotiation & redlining was integrated via altaFlow with OMI's sales workflow in Salesforce, the number of manual iterations was quickly reduced to a minimum. Paul describes it as “turning into the click of a button.” The time-saving effect of this consolidation was notable almost immediately:

“altaFlow saves our Sales team a tremendous amount of time and allows us to assign resources a lot quicker. Thus, our customers get engaged a lot quicker, and we can get everything started much sooner these days,”

[explains Paul](#)

Helping other businesses get the most of altaFlow and signNow

OMI came to know about altaFlow, as a standalone product and a vendor of signNow, about a year ago. Almost immediately, they realized that altaFlow was the perfect match for what they were already doing, primarily due to the accumulated experience with the custom applications of Salesforce, Dynamics, and some other software systems.

Today, OMI is implementing altaFlow for:

a) companies that are already using Salesforce or Dynamics 365, b) companies that were introduced to altaFlow independently but are lacking resources to implement it by themselves, c) companies interested in customizing signNow API solutions (integrating eSignature functionality into their existing business flows).

Helping other businesses get the most of altaFlow and signNow“The breakdown between current airSlate users and those who come as Salesforce users is close to 50/50. Some customers also come through our joint partnerships, such as AppDirect or AppSmart.”

[explains Paul](#)

Paul has a wide range of success stories from businesses of all sizes and industries in his portfolio. Below are a few of OMI’s selected use cases.

01. A non-profit organization saving up to 25 hours each week:

“They purchased altaFlow, and then came to us for implementation. At that point, they didn’t have Salesforce or any other CRM. They only had Dropbox, and they were an actively hiring organization, sending around 20 documents to each applicant! With our help, this whole process is now organized in altaFlow, and manual work is almost entirely eliminated. They quoted 20 to 25 hours of work saved per week.”

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explains Paul

When concluding our interview, we asked Paul a question we felt was most applicable to digital transformation and workflow automation moving into 2022:

If the lockdowns did not make businesses go digital before, why and how should they start digitizing now?

Paul’s answer is certainly something to reflect on:

“For whatever reason, there are still quite a lot of businesses that did not manage to automate and optimize during the COVID lockdown. Most probably, they do not realize the tremendous time-saving effect from it. And not only internally but also for customers and other stakeholders.

I would recommend starting small. Many people try to bite off too much from this automation pie. Start small, with one or two key processes. Continuous improvement is great. With time, process automation will surely expand to every core business process of an organization.”