



SHIFT HELPS A LIFESTYLE MEDIA COMPANY

define their
business clearly from front to
back end

ABOUT OBSERVER MEDIA

Headquartered in New York's Times Square, Observer Media delivers premium lifestyle and business titles covering innovation, commerce, and luxury to more than five million of the nation's most affluent and educated individuals. Notable properties include, the New York Observer, Betabeat, Gallerist, Commercial Observer and SCENE.

► The problem

While Observer Media is renowned for its ability to uncover the very best of New York, they wanted to bring that level of clarity and insight to their own business processes. With three discrete business platforms—Act!, Quickbooks, and Mediaspan—capturing different business processes, the system was labor-intensive.

“Visibility was lacking,” says Tom D’Agostino, Controller for Observer Media. For him, the disconnect between sales and billing activities meant that inaccuracies were lost in the system, only to resurface a month or two later when it was time to collect funds owing.

The lack of integration was creating a lot of extra work for everyone. Each sales rep individually communicated insertion orders to the operations team, who would then manually enter the data into Mediaspan. At the end of the month, the financial team would run a report out of Mediaspan and transfer the data to Quickbooks. *“There was a lot of manual entering and re-entering,”* says D’Agostino.

► The solution

Observer Media needed to gain a clear line of sight from front to back end, and they were ready to move to a more flexible, future-proof Salesforce environment. Integrating sales, operations, and accounting was essential, and to add to the challenge, they wanted to build this fully integrated system using the Salesforce Professional edition.

Observer Media chose Shift because they had the right mix of Salesforce expertise and a deep knowledge of their industry. *“We relied on Shift a lot for best practices and guidance on digital scheduling and digital revenue,”* D’Agostino says.

The Shift team was able to fulfill every project requirement by implementing a Salesforce solution that connected with Quickbooks. The resulting integration created a front-

to-back-end solution that supported full visibility and seamless integration between sales and accounting activities. In the new system, manual tasks such as generating proposals and scanning documents for signature have been replaced by automated processes, sales reps can enter insertion orders directly into Salesforce, and the accounting team can sync those orders with Quickbooks to generate invoices as needed.

“Visibility was lacking.”

► The result

While the integration project was primarily intended to support the accounting department, it had a considerable impact on the sales team as well.

“On the old system, they took a call or an email and passed it on to someone else,” D’Agostino explains. “Now they’re seeing the benefit of putting all that client information into the system—contacts, emails, numbers—and linking everything to an account and an agency.”

Another big benefit for sales is gaining remote access to account information. *“That’s extremely useful for them when they’re travelling,”* he says. The system is also helping the sales team understand their product better. “Now they’re able to go line by line and enter in products, which helps them learn a little bit more about what they’re selling.”

For the accounting department, the wins were significant. Now that the sales and accounting systems can “talk” to each other, day-to-day operations have been transformed.

“The process is so much more efficient,” says D’Agostino. “Revenue is being synced the day after the publication prints, and we’re able to get invoices out faster.”

He says the new system has also done a great job of eliminating manual work in his department, which will help everyone on staff make better use of their time. *“Now the roles of the receivables team here could expand*



“We relied on Shift a lot for best practices and guidance.”

to take on new roles, such as booking cash and taking some responsibilities off my plate, so I can move on to other things.”

► Looking to the future...

The project was so successful that Observer Media have already started thinking about the next phase. They’re considering adding a system that can track actual as well as scheduled earnings for sales of their digital products and provide greater accuracy to their P&L statements. When they’re ready to move forward, their first call will be to Shift.

“There’s no question we would use Shift again,” says D’Agostino. “They’re very good, very knowledgeable and helpful. They were supportive and responsive throughout the process—even in the evenings and on weekends.”

The experience with Shift has given D’Agostino confidence that Observer Media can take on complex integration projects with minimal interruption to day-to-day business operations. *“Everything that comes up, Shift knows exactly how to go in, where to look, and how to find it,”* he says. “And it’s usually no more than a day turnaround for them to find out what the issue was and resolve it.”

About Shift

Shift is a Salesforce Platinum Cloud Alliance Partner with more than 150 years of combined experience implementing, configuring, and re-envisioning the world’s #1 sales and service platform. We also offer a range of off-the-shelf technology solutions designed to enhance and extend Salesforce functionality for small businesses and Fortune 500 organizations in specialized industries including technology, manufacturing, media and communications, healthcare, the nonprofit sector, and professional services. Headquartered in Toronto, Canada, with a local presence in Ottawa, Vancouver and New York, we provide both remote and onsite service to a global client list.

Toronto Office | 416-635-1300

155 Gordon Baker Road, Suite 206,
Toronto, ON, Canada M2H 3N5

Vancouver Office | 604 836-2666

211 – 3030 Lincoln Avenue
Coquitlam, BC, Canada V3B 6B4

info@shift-crm.com

www.shiftcrm.com



PLATINUM
CLOUD ALLIANCE
PARTNER