

Success Story

NPI Financial: Expedited Deal Management

NPI Financial, founded in 2003 and based in Atlanta, GA, provides custom analysis for clients in the IT, shipping, and telecom industries. NPI strives to eliminate overspending through the utilization of cost models and price analysis. NPI analysts identify savings for clients as high as 7-figures. In return, this empowers clients to make the best purchases for their organization.

The Challenge

NPI needed a way to streamline Salesforce data population and communication archiving for a growing delivery team focused on building client relationships. Management noted that staff members lost time manually tracking interactions and statuses. The right solution would be one that reduced the time to create and close a deal, captured pertinent information into the CRM, and eliminated the need to work in spreadsheets.

NPI implemented a native email integration tool for Outlook in order to simplify the process of recording communications with clients. However, employees took too long to track deals and related content to Salesforce. "I found that when our customers sent us a deal-related email, staff took an average of 27 days to add and close the deal in Salesforce," said Maggie Jolitz, Director of Operations Services, NPI.

The Solution

NPI evaluated alternate email integration solutions but found that few were able to deliver for their specific needs. Jolitz had encountered LinkPoint Connect at a prior company and recalled its ease of use. Software stability and standout features, including the ability to drag and drop email signatures to create new Salesforce records, became key benefits and led to NPI's decision to choose LinkPoint Connect.

LinkPoint Connect provided NPI with an easier and more efficient way to record emails to specific records and create new Salesforce items from Outlook. The Side Panel empowered users with CRM knowledge automatically. "With a window into Salesforce from Outlook, our users were able to identify accounts automatically and focus on servicing customers," said Jolitz. "The ability to view Deals in Outlook the moment an email was received increased communication, collaboration, and teamwork." Additionally, employees could archive attachments and control which Salesforce records they were associated with.

LinkPoint360 Professional Services also customized NPI's installer to support compatibility with the Salesforce Deals object. "The implementation team was engaged in learning as much of our business as they could to understand our workflow needs, which helped ensure that our deployment was effective," said Jolitz. NPI rolled out LinkPoint Connect to the delivery team as well as project team members to support staff with customer-facing roles.

The Results

NPI users were introduced to LinkPoint Connect as an all-encompassing tool for email recording, record creation, and calendar syncing. With only a few clicks, users could quickly access or add Salesforce data, which was a positive shift from past workflows. "When we began installing the software, users immediately noticed that this was a game changer for their work life," said Jolitz.

Prior to implementing LinkPoint Connect, employees spent 30% of their time manually adding information in Salesforce. "Our users are saving time creating records since the Smart Forms fill out fields automatically from a single email," said Jolitz. Management also noted a reduction in time spent entering deals, which decreased from 27 days to just 1 day.

Information technology company chooses LinkPoint Connect to expedite deal management and to refocus teams on client relationships.

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*Director of Operations Services
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“One of my biggest accomplishments when I first joined NPI was solving the email integration issue,” said Jolitz. “We now have the capacity to understand how many deals come in, how they come in, and how they are assigned.” With timely, accurate content in Salesforce, NPI can now review performance and project future growth for the business.

Internal support for Salesforce also increased as users saw the benefits of working with data in the CRM. “In the beginning, stakeholders had difficulty discerning how Salesforce could benefit the organization. Now, users see the possibilities and proactively bring me ideas for how we can leverage it even more,” said Jolitz.