THE IMPACT OF
CLIENT EXPERIENCE
IN 2022

SIKICH

CONTENTS

GROW AND COMPETE BY DELIVERING
THE BEST POSSIBLE CLIENT EXPERIENCE

What do your clients tell you about the ease of doing business with your company? Are you providing a consistent, productive, engaging experience in every channel and at every touchpoint? If you run NetSuite ERP and Salesforce CRM as two disparate systems, integrating them can make an immediate difference in your company's ability to serve clients, speed up communications and interactions, deliver profitable projects, and drive growth. It also can generate substantial cost savings and efficiencies.

Even with all the technical expertise you may have in-house, it still makes sense to collaborate with Sikich as your integration partner. Experienced Sikich consultants have performed many successful NetSuite and Salesforce implementations. They know how to deliver integration projects with the outcomes you hope to achieve. If you already have either NetSuite or Salesforce, it may also be to your advantage to add and integrate the other solution.

> **89% of business clients** feel that the experience a company provides is as important as its products and services.[1]
>
> Only **51% of professional-services companies** make their clients feel that they understand their needs and expectations.[1]

CLIENT EXPERIENCE AS A BUSINESS OPPORTUNITY

The perceived value of clients' experience quality almost equals that of a company's services and other offerings. Research shows that 89 percent of business clients feel that the experience a company provides is as important as its products and services. 82 percent say that even one extraordinary experience is likely to raise their expectations of other companies, and 82 percent also are willing to pay more for a great experience.[1]

What would clients want to see in their experiences with professional-services organizations? The preferences of many potential clients are perfectly reasonable. For example, 83 percent want to interact with someone immediately when they get in touch with a company. 82 percent expect to solve complex issues by talking to just one person.[2]

However, many firms do not meet clients' expectations. 73 percent of potential clients say that they expect companies to understand their needs and expectations, but only 51 percent approach this standard. 62 percent state that they expect businesses to adapt, based on their actions, and just 47 percent feel that companies do so. One has to assume that many clients are disappointed in their providers and open to considering other options.

These statistics are an average of what respondents of different ages shared. When you exclude older generations and recalibrate the survey results for millennials and generation Z, the rate of those who are dissatisfied with their providers is significantly higher. If your services organization cannot adapt to what clients expect from their engagement experience, you may lose especially the younger clients whose numbers in the workplace are quickly increasing. That would not bode well for the viability of your business.

On the other hand, if you deliver the kind of high-quality, consistent, omni-channel experience clients hope for, you may be able to sharpen your competitive edge and improve client retention and satisfaction. Relatively simple measures like giving your teams a complete view of client data across ERP and CRM can already make a huge difference. Another example: if, in addition to integrating NetSuite and Salesforce, you make use of the Salesforce Experience Cloud to offer customers portals and online resources, you can make it much easier for clients to engage with you, and for customer-facing teams to make a real difference for clients.

INTEGRATION AS YOUR BEST, NEXT STEP

Technology companies deliver a wide range of services to clients. As part of their projects, they may write, deploy, and refine custom software, help businesses refresh their data-center infrastructure and client computing, provide everyday support together with strategic consulting, and lots more. These companies range in size from small, specialized teams to large organizations that work with global enterprises. Some of them may also offer specialized software and hardware products that complement their service portfolio.

What these technology-services businesses share is the core goal of enabling their clients' success and the ability to deliver on this commitment. They aim to be as responsive and connected to their clients as possible. For many clients, in turn, partnering with technology-services consultants is business-critical, especially when they don't have needed skills and capabilities within their own organizations, or when they need to respond more quickly and effectively to market changes than they could on their own.

When clients feel that service providers don't meet their expectations or don't deliver a good engagement experience, they may not always speak up, but temporarily tolerate shortcomings or leave quietly. The services companies that connect with Sikich would certainly agree with the statistical findings above. In recent years, expectations for the quality and efficiency of services and business interactions have greatly increased, also because many of us have experienced excellent services in our personal experience.

For many good reasons, the two powerful, well-designed cloud solutions—NetSuite ERP and Salesforce CRM—are popular with professional-services companies, which use them to run critical aspects of their business. Integrating them can quickly deliver an enhanced ability to up-level the client-experience quality you deliver.
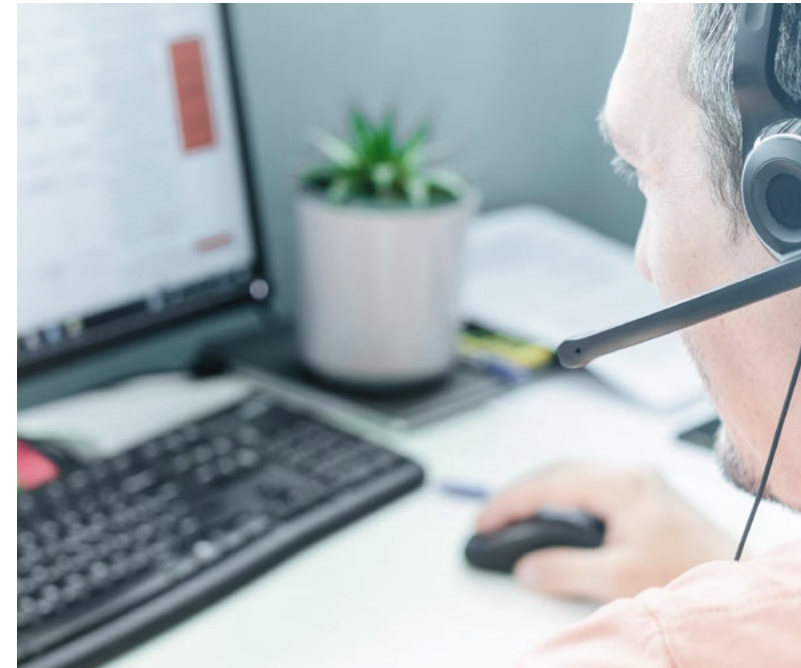
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MAKING THE BEST OF MODERN CLOUD SOLUTIONS

When clients and talent could be almost anywhere, software capabilities in the cloud make great sense. They can easily be accessed on almost any device, anytime, from any location.

However, when technology-services firms are fully focused on their clients, they may not act on promising, internal opportunities for process and infrastructure improvements. Often, they run NetSuite and Salesforce as disparate systems. Some users may only need CRM or ERP, but others rely on data and capabilities in both, and need to ask administrators to get their information and reports instead of using self-service capabilities at their convenience. Others again could benefit from an integration, but may not know what they're missing. When the CRM and ERP domains don't connect, data can easily fall out of sync, potentially compromising customer and employee experiences and interfering with a company's decision-making, forecasting, and planning.

When we work with technology-focused services firms, we almost always recommend integrating the two systems. Sikich is unusual in that we have both a NetSuite and a Salesforce practice and maintain vital partnerships with both organizations. We have implemented, configured, and integrated NetSuite and Salesforce for many organizations, performing projects with an also integrated team and a single point of accountability for our clients.

SIKICH IS UNUSUAL IN THAT WE HAVE BOTH A NETSUITE AND A SALESFORCE PRACTICE AND MAINTAIN VITAL PARTNERSHIPS WITH BOTH ORGANIZATIONS.

SEVEN INITIAL TRANSFORMATIONS TO ENHANCE THE CLIENT EXPERIENCE

Following a NetSuite and Salesforce integration, you can enhance the client experience in many ways. How you want to transform it really depends on what you feel will make the most impact for clients and your organization. Several improvements can happen almost immediately following an integration:

01 | GIVE CLIENTS OWNERSHIP

Clients can streamline their interactions with your firm and accomplish more on their own, using cloud-based and mobile tools. They can easily log into one cloud resource to review their invoices, get project updates, make a suggestion for a service innovation, or create a support ticket. No matter what channel customers use to engage, their experience with your business can be consistent, personalized, and rewarding.

02 | BE AVAILABLE TO CLIENTS ACROSS CHANNELS

At the same time, you can become more accessible and responsive to clients, without losing consistency or fragmenting your processes. Some don't want email, they prefer chat. Others don't want to wait for a dispatch call, but schedule an appointment or a service enhancement on their own. You might provide new, potentially high-value avenues for productive interaction, like secure customer forums and communities. You can offer clients all these engagement channels and be assured that the right people from your organization will be able to take action promptly.

03 CREATE VALUE FROM INFORMATION

Data flows are no longer impeded, so you can deliver information from both NetSuite and Salesforce to the people who can benefit from it. Nobody needs to be on hold or wait for a callback while a customer-facing employee looks in another system for information or contacts a colleague for assistance. Everybody works off the same, current, comprehensive data, so there are no discrepancies to be resolved or gaps to be bridged.

04 ACCELERATE WORKFLOWS

Many handoffs between individuals at various stages of processes can connect instead of being disjointed. For example, you can move client projects more rapidly and easier from initial scoping, to quoting, to performing the work, and to invoicing and managing the financials.

05 ENABLE PROACTIVITY

Some customer-facing team members in sales or service teams will be able to be more proactive. It can become easier for them to anticipate what customers might need or what should come next for them in terms of the company's services or products.

06 AUTOMATE PROCESSES

You can automate frequent, important transitions and eliminate the risk of process delays or forgotten steps that could slow client events. For instance, an order in Salesforce can trigger an invoicing task in NetSuite, which can in turn send a confirmation to Salesforce once that step is complete.

07 MINIMIZE BUSYWORK

You can eliminate the error-prone, redundant data entry and lookup that forced employees to spend time unproductively or help others out. They can now do more valuable, client-focused work that is a much better use of their skills and better aligned with the company's mission.

REALIGNING THE CONFIGURE, PRICE, QUOTE PROCESS AND SALES MANAGEMENT WITH CLIENT NEEDS

You can be more competitive and confident as you provide accurate, speedy quotations and proposals to clients and prospects. When in many professional-services firms the configure, price, quote (CPQ) process is still managed in multiple, error-prone spreadsheets and by means of inefficient, partly manual processes, you can do much better. Without missing a beat, you can accommodate highly specific client requirements, add services to projects already in progress, and bundle services.

At the same time, you can accelerate CPQ and sales processes and bring more accuracy and consistency to them. Faster, simpler processes can translate into happier clients who are more open to increase their spending with your company.

Upselling, cross-selling, or renewing and bundling services no longer needs to be the domain of your highly expert sales stars, because more team members have access to the information that allows them to work effectively with customers. If service tickets or support needs result in a billing change, the data can flow from CRM to ERP without having to be re-entered.

Internally, reporting on the sales pipeline or such typical professional-services metrics like resource availability and utilization can become more accurate and efficient. You don't need to navigate two systems and harmonize their data, which may require research and error correction. You can run reliable, realtime performance reports per client type, project, business group, or for the entire company, drawing on both CRM and ERP. Sikich can also set up custom dashboards for your executives and decision-makers to deliver the most relevant data in an intuitive, practical format.

FASTER, SIMPLER PROCESSES CAN TRANSLATE INTO HAPPIER CLIENTS WHO ARE MORE OPEN TO INCREASE THEIR SPENDING WITH YOUR COMPANY.

For some clients, being able to hear from a company executive may make a crucial difference in how they feel about their services provider and the continued engagement with your company.

CLIENT-CENTRIC ENABLEMENT ACROSS BUSINESS GROUPS

With an all-round view of the business and its clients, including account performance, project progress, and engagement histories, your project leads, business managers, and executives can understand clients better, take the right steps to move projects along, and make sure that all activities and processes in the business truly serve the purpose of bringing value to clients. For a variety of business roles in technology-services firms, Sikich consultants often create optimized dashboards in which business decision-makers and planners can see the data that matters to them in a convenient, intelligible format.

Above, we already discussed sales. Let's take a look at how some other technology-using roles can benefit from a NetSuite and Salesforce integration:

EMPOWERED, IN-TOUCH EXECUTIVES

Executives used to seeing a fraction of available data can be in touch with the pulse of the entire business. They benefit from a clear view that can range from granular project and client events to overall performance and workforce trends. Some executives will for the first time have access to up-to-date client data, allowing them to support sales efforts or interact with customers at key junctures in their journey with the company. They can drive innovative and transformational initiatives on a solid foundation of all-encompassing data insight. For some clients, being able to hear from a company executive may make a crucial difference in how they feel about their services provider and the continued engagement with your company.

With an earlier, more complete view of financial conditions, finance managers have a better understanding of the events that are about to impact the company and can be more effective in ensuring its financial health.

PROJECT MANAGERS MORE EFFECTIVE THAN EVER

Project managers don't need to manually copy information from CRM, ERP, or a specialized project management software to make sure it syncs across systems. Instead, they can be more accountable for the performance and profitability of their projects, working with dashboards or reports that show them how projects impact the company's business performance and key metrics. They can see current project billing and accounts receivable at a glance. Project reporting will often take just a fraction of the time it used to require. Client conversations can be more productive when project managers have all relevant information available and can make promises and commitments with a high level of assurance. When clients require a variation on standard work breakdown structures or it's necessary to use multiple billing and revenue types on the same engagement, making those adjustments across systems is a minor effort.

FINANCE MANAGEMENT WITH A GREATER REACH

As data visibility also extends into the CRM realm for ERP users, finance managers may now be able to review Salesforce data related to customers, contracts, bookings, and other elements of the business. With an earlier, more complete view of financial conditions, they have a better understanding of the events that are about to impact the company and can be more effective in ensuring its financial health. Those advantages augment the ERP capabilities they already use, including accurate and timely invoicing, or reliable forecasting of project revenues and other financials. However, most of the busywork of searching for information and harmonizing it falls away. In addition, by automating routine project billing, you can reduce errors and days outstanding even more.

HR ENABLED TO DEVELOP THE RIGHT WORKFORCE

Sometimes relegated to a supporting function, the HR team can play a more strategic role to help drive the business forward and enable outstanding client experiences by recruiting and retaining talented people who want to do meaningful, rewarding work. As an employer, you don't want to generate workforce turnover or watch people become disengaged when they have to navigate stand-alone technologies or manual processes that don't allow them to work efficiently or force them to wait for information. Instead, you can deliver an empowering employee experience with NetSuite and Salesforce. The quality of that experience can remain high because the two solutions see continuous improvement with frequent updates. Your employees can make great use of their expertise and creativity as they serve clients. Ultimately, it's the clients who benefit from consistent, proactive, fast services delivered by motivated people.

WORKING WITH SIKICH

When we integrate your CRM and ERP systems, we follow repeatable, streamlined processes and proven methodologies that keep your project on track and within your budget. Sikich also offers business consulting and advisory services that can augment our work on your technology systems.

Business user needs should determine what exactly a NetSuite and Salesforce integration looks like and how it should deliver unimpeded data flows and information access. Both NetSuite and Salesforce have their respective strengths, and Sikich experts know how to build on them when we perform an integration project. We use a variety of proven tools, together with our own development resources, to realize these integrations. Many excellent middleware software products can be helpful in achieving this, and the best choice usually depends on which one best fits a client's requirements.

FORECASTING AND MEASURING RESULTS

Many Sikich professional-services clients use measures like the Net Promoter Score (NPS) or other metrics to assess improvements in their client experience. We can help you gather the right data, observe meaningful differences, and sustain positive change.

We understand that delivering the best possible client experience is the top priority for our professional and IT services clients. Cost savings and efficiencies may not be as urgent. However, they can be an indirect indicator that it's become easier for clients to interact with and receive services from your organization. A NetSuite and Salesforce integration can help you cut expenses. The most likely and immediate savings would probably result from replacing redundant data entry, disjointed processes, and unreliable, inconsistent information with one-time data
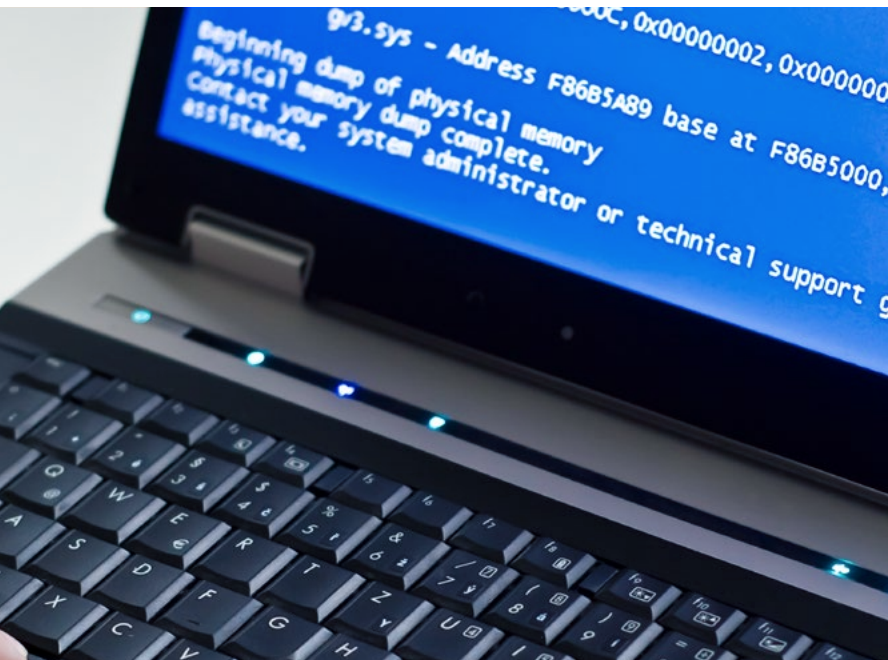
recording, connected processes, and consistent, dependable data. Improving their operations, professional-services companies have achieved a number of outstanding outcomes, for example:[3]

• 7% increased revenue per billable employee
• 4% increased gross margin
• 10 days reduced time to close books at month end
• $46,000 savings in annual systems costs
• 33% increase in finance team efficiency
• 13 days reduced time to prepare annual budgets

Professional-services firms have also generated remarkable results specifically by modernizing their CPQ process:

• 25% increased sales productivity
• 19% increased upselling
• 33% faster quote generation
• 38% error reduction

ALIGNING PROCESSES AND BUSINESS GOALS

Many complications and errors can occur if professional-services companies run NetSuite and Salesforce as disparate systems and inadvertently allow data to misalign. If that is the case, we work with you to determine how those disconnects happened and what data-cleansing steps may be needed—before we go ahead with an integration. Sometimes, redundancy is at play. For example, a transaction is booked in Salesforce first, and in NetSuite later. Or, business practices may not fully align. For instance, the definition of a customer may not be the same in NetSuite and Salesforce. You should address such process disconnects and inefficiencies, so the planned integration of NetSuite and Salesforce has a chance of helping the business instead of making processes more complicated and costly.

MANY COMPLICATIONS AND ERRORS CAN OCCUR IF PROFESSIONAL-SERVICES COMPANIES RUN NETSUITE AND SALESFORCE AS DISPARATE SYSTEMS AND INADVERTENTLY ALLOW DATA TO MISALIGN.

Sikich consultants can help you assess and update business activities. This can take the form of a Sikich Business Process Alignment (BPA) or become a smaller, more tactical effort. The advantage of a BPA is that you can draw on the organizational change management expertise of the Sikich team to refine workflows and process handoffs. That may also involve updating accountabilities and challenging people to think creatively about their roles.

EASIER COMPLIANCE AUDITS

When high-tech professional services companies serve federal, state, or local government agencies, they may need to comply with complex, regulatory mandates for reporting finances and some other details of the business, such as Defense Contract Audit Agency (DCAA). They will need to test their systems and processes to gain assurance that they can successfully pass audits. By improving the availability, accuracy, and consistency of business data, integrating NetSuite and Salesforce can make compliance simpler and less risky. Auditors may feel greater confidence when they see that it's easier than before to test contracts and activities such as invoicing or revenue recognition. Instead of testing transactions in NetSuite ERP alone, they may also be able to test processes that begin in Salesforce CRM and eventually impact financial documents and data in NetSuite.

Regulatory compliance can be a challenging discipline with an outsize impact on the health of your business. Sikich consultants can help you find the most dependable and efficient way to ensure compliance in your NetSuite and Salesforce environment.

A NETSUITE AND SALESFORCE INTEGRATION PERFORMED BY SIKICH CAN HAPPEN IN A FEW MONTHS OR EVEN WEEKS, DEPENDING ON THE COMPLEXITY OF THE PROJECT.

DRIVING FOR THE CHANGE YOU WANT

As key contributors in a changing, growing technology consultancy, our consultants have the empathy and expertise to make change management in your technology services organization painless and productive. We know how to assist you in obtaining buy-in from all stakeholders and bringing about the organizational and cultural alignments without which the value of the integration might be limited. We also can help business stakeholders negotiate and collaborate with IT when, as sometimes happens, the IT group has not previously been involved with Salesforce.

FAST-PROJECT DELIVERY

Including research, fact finding, and a BPA in addition to the actual integration and handoff to you, a NetSuite and Salesforce integration performed by Sikich can happen in a few months or even weeks, depending on the complexity of the project. Some clients see the benefits of the NetSuite and Salesforce integration and want to explore the advantages of connecting other applications to the integrated CRM and ERP environment, and Sikich often performs valuable integrations of such business systems for them.

Sikich relies on an agile, adaptive methodology to deliver successful projects with the best balance of speed and value. This allows us to be flexible when client needs change, but maintain the project momentum and focus on your desired outcomes. During a Sikich-led integration project, we provide you with a portal, built on Salesforce, where you always have visibility of the status of your project and can in real time collaborate with your Sikich consultants and provide feedback.

TAKING THE NEXT STEP

At Sikich, all NetSuite and Salesforce expertise resides within our teams. Like you, we're a client-focused company whose success depends on the experience and service quality we provide. As mentioned, if you currently only run NetSuite or Salesforce, it might be worth evaluating whether it makes sense for the business to add the other solution and integrate it. If you already run both NetSuite and Salesforce as stand-alone systems, it would probably make sense to see how you can optimize and integrate the solutions to create a personalized, digital experience for your clients. We can help you make these decisions and begin mapping what business results you could achieve by taking those steps.

After Sikich has completed your NetSuite and Salesforce integration, your team can continue to manage the technology environment. That's what most technology services companies choose to do. Alternatively, you can contract with us to provide ongoing management or support for specific concerns. We have completed many NetSuite and Salesforce deployments and integrations, gaining a wealth of specialized expertise. We can make modifications in data flows or processes supported by the integrated solutions without needless complications and unwanted side effects.

If you want to find out more or would like to pursue an integration of NetSuite and Salesforce:

• Contact us and we'll be right back in touch.
• Learn about Sikich CRM and ERP services.
• Follow us on LinkedIn, Twitter, and Facebook.

LIKE YOUR FIRM, SIKICH IS A CLIENT-FOCUSED COMPANY WHOSE SUCCESS DEPENDS ON THE EXPERIENCE AND SERVICE QUALITY WE PROVIDE.

ABOUT SIKICH

Sikich is a leading professional-services firm that is among the top 1 percent of all enterprise resource planning solution partners in the world and ranks as one of the United States' Top 30 CPA Firms. Sikich is also ranked as number 9 in the country's top 100 technology providers. To every project, Sikich ERP and CRM experts contribute more than 30 years of team experience and an outstanding track record with a success rate of 97 percent. Sikich partners with the industry leaders, including Microsoft, NetSuite, and SonicWALL. Sikich is a Microsoft Gold and Microsoft Dynamics Inner Circle Partner focused on delivering technology solutions for tangible business improvement and organizational excellence.

To learn more about Sikich, go to **www.sikich.com/technology** or contact **info@sikich.com**.

[1] Salesforce, "State of the Connected Customer," Third Edition, at
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[3] Internal Oracle NetSuite research

[4] Salesforce research published at https://www.salesforce.com/form/cpq/demo-sem-cpq-billing/