



CDC Foundation successfully manages a five-fold increase in transactions during the COVID pandemic with Celigo



Customer

CDC Foundation

Segment

Non-Profit

Products

Celigo Integrator.io with Salesforce, NetSuite, ADP, Concur

About

The CDC Foundation is an independent nonprofit and the sole entity created by Congress to mobilize philanthropic and private-sector resources to support the Centers for Disease Control and Prevention's critical health protection work. The Foundation has launched more than 1,200 health protection programs and raised over \$1.25 billion to support the CDC's work over the past two decades.

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— Malcolm James
Senior Technology and
Business Solutions Manager
CDC Foundation

Background

For over 20 years, the CDC Foundation has been growing, while the technology to run the Foundation lagged. Four years ago, the Foundation started a technology transformation, getting away from paper-based processes, and moving to the cloud by replacing its legacy systems with best-of-breed SaaS solutions such as Salesforce, NetSuite, ADP, Concur, and more support.

The Challenge

When the CDC Foundation first migrated its entire operations into cloud-based solutions, they knew they would also need to connect them all to properly manage them. One of the challenges the Foundation faced was due to the uniqueness and highly-customized nature of its processes and operations.

"It was a bit of a struggle for us to not only determine what to connect, how to connect, and when to connect it, but also what our business required," said Malcolm James, Senior Technology and Business Solutions Manager, who along with the Foundation's chief operating officer spearheaded the digital transformation effort of the Foundation. "We saw when we met with vendors for these different implementations just how unique our business is. A lot of times the best practices didn't necessarily accommodate our practices or our processes."

The business was feeling the weight of manual processes, with staff dedicated to doing manual CSV uploads and reconciliation from system to system. As the sole member of the IT team, James needed a solution that was customizable, powerful, worked well with the CDC Foundation's systems, yet was simple to build and maintain as the organization grew.

The Solution

After a thorough vetting process to choose an integration vendor, James settled on Celigo to be the iPaaS provider across all systems for the Foundation.

"We chose Celigo because they gave us comfort as the integration leader in the systems we decided to move forward with," said James. "The user experience was a big part of it because we knew that it would be something that we'd manage internally. Things change very fast internally at the Foundation, so that flexibility to be able to use and understand the system on our own was huge."

Celigo guided how the Foundation's very customized systems should be set up and integrated. "We went through a comprehensive exercise with Celigo," said James. "Celigo was very big in helping us not simplify our processes. Going in, one of our biggest concerns was around connecting two custom elements. But there have been zero issues around that."

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The Bottom Line

With Celigo, the CDC Foundation built a highly-customized integration between its instances of Salesforce and Netsuite. As the integration went live, the world was hit with the COVID pandemic, and given the CDC's critical role in addressing the disease, within months the organization saw its volume of transactions increase five-fold.

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James also says that the intuitive nature of Celigo made it simple for the staff to become familiar with and take ownership of the platform.

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"Our staff now has a different mindset looking at whatever our business process may be, and can really think about how we can make it more efficient and automate it," he added.

The Foundation is currently implementing Concur-NetSuite for expense management and ADP-NetSuite to automate HR processes with Celigo. By continuing with its Digital Transformation efforts, the CDC Foundation can focus valuable resources where it needs the most—to support its mission to support the Centers for Disease Control.

"Everyone can see the value add of these integrations," said James. "It has been easy for the staff and administrators in the various departments to continue using their systems. It has been overwhelmingly positive."

About Celigo

Celigo is the leading enterprise-wide Integration Platform as a Service (iPaaS) for the mid-market. Named a G2 Best Software for 2021, Celigo enables breakaway growth, controlled cost management, and superior customer experiences by ensuring that every process—at any level of the organization—can be automated in the most optimal way.