

## Success Story

# Spiralsoft

## Salesforce and DocuSign Sparks Digital Transformation



Spiralsoft is an in-house design and software development company, specialising in accounting and retail point-of-sale systems. Established in 1999, Spiralsoft provides quality software applications to help its customers grow their businesses. As the leading choice for centralised software applications in key industries across the globe, Spiralsoft understands the importance of reliable and easy-to-use business management software and is committed to providing its customers with the latest technology in accounting software solutions.

### Company Facts

#### Overview

- X** **Location:** Centurion, Gauteng, South Africa
- X** **Industry:** Software – Accounting and POS
- X** **Website:** [www.spiralsoft.co.za](http://www.spiralsoft.co.za)

### Success Highlights

#### Challenges

- X** Automating and Optimising Sales Processes
- X** Lack of Consolidated Dashboards
- X** Centralised System for Sales and Service

#### Solution

- X** Salesforce – Sales Cloud
- X** Salesforce – Service Cloud
- X** Salesforce – CRM
- X** DocuSign

### Challenging business environment

The biggest challenge that Spiralsoft faced was that a large part of its sales process was still managed manually, with sales figures and reporting done in Excel. “*The growth of our Sales Department by 300% dramatically increased the need for automating our sales processes to the top of our priority list,*” states Ashley Becker, Managing Director of Spiralsoft. Becker understood that, in order to better manage staff and sales figures, automation was key to overcoming time constraints.

Spiralsoft adjusted and optimised its sales processes internally and found that the contract signing portion showed the most inefficiencies, creating a “bottle-neck” scenario which needed to be streamlined in order to decrease frustration levels for Spiralsoft customers and internal sales staff. As a result, Spiralsoft decided to move towards finding a new system that was more advanced and accessible. Salesforce and DocuSign were the perfect solution.

Currently, Spiralsoft is still constantly competing with several leading firms in the Accounting Software industry, of which most have large funding investors. Because of this, it often proves to be difficult to deliver an equal standard of service with limited funding. “*One of our most testing challenges is delivering customised and industry specific developed software in shorter turnaround times, without additional investor funding,*” admits Becker. Despite this, Spiralsoft continues to succeed. Spiralsoft has evolved by staying ahead of software requirements and ever-changing customer needs. The company strives to always think of out-of-the-box solutions and innovations to equip its customers with easily accessible features that increase productivity.

## Benefits

- X Fast and Efficient Sales Process
- X Exception reporting and management
- X Better Customer Relationships
- X Solid Base for Digital Expansion

## Implementation and Solution

As with the start of most software implementations, Spiralsoft was concerned that this project would consume large portions of its resources to implement the new processes and procedures. *“These fears were quickly alleviated,”* Says Becker. *“Salesforce offered a single solution with different applications for all our needs, wrapped up in one product. New Era Solutions (NES) was able to provide us with a pre-configured Salesforce solution which drastically reduced implementation time.”*

Adeline Cruywagen, Operations Manager at NES, notes that *“NES’ Quick Start approach on Salesforce allows for an exceptionally quick implementation time, without sacrificing quality, and still utilising industry-best practices that have been accumulated over 20 years of experience.”*

Through the implementation of Salesforce Service Cloud, Spiralsoft has been able to significantly increase its service team’s productivity, enhancing customer satisfaction to an exceptional level.

Salesforce’s Sales Cloud has been implemented within the sales team to assist the larger team with higher volumes of leads. *“Management can now directly view sales activity, without needing to be involved with each individual sales team member. The Sales and Service dashboards that were included were huge selling points for us,”* stated Becker

Cruywagen also highlights the fact that *“The pre-configured sales and service dashboards that ship with the NES’ Quick Start for Salesforce*

## Making decisions for growth and transformation

Spiralsoft set out to find a new system that would enable the company to replace its manual sales system and processes. One of the major criteria for Spiralsoft in the selection of a Customer Relationship Management (CRM) system was that it had to be a highly regarded solution. Salesforce and DocuSign met all the requirements and catered to Spiralsoft’s specific needs. These systems also allowed for future expansions and integration that fitted well with Spiralsoft’s digital transformation vision. Salesforce effectively complimented Spiralsoft’s company culture of “thinking ahead and working smarter”.

To reduce waiting-time spent on administration and contract negotiation during the sales process DocuSign was implemented and integrated with Salesforce. The direct result was that onsite storage for documentation could be eliminated through electronic storage management, with access to these contracts becoming accessible from anywhere.

*“DocuSign has increased the accuracy of our documents, simplifying our final step when welcoming customers to come on board with us,”* says Becker. Salesforce has assisted Spiralsoft as a business to structure a more streamlined environment and eliminated any inefficient processes. This, in-turn, has increased information flow and provided access to a bigger variety of customer communications

## Partnering for growth

*“From the first meeting we knew that our Quick Start approach would be a hand-to-glove fit for Spiralsoft - specifically with regards to what it wanted to achieve using Salesforce, and its goals as a business. As a service provider, we were excited to embark on this journey with Spiralsoft,”* expresses Cruywagen.

Becker adds that *“The NES team is extremely professional and very helpful. From the moment the final decision was made to proceed with Salesforce, the next steps followed quickly.”*

The partnership created between NES and Spiralsoft was one of mutual respect and seamless communication and execution. All parties at Spiralsoft received regular updates which informed them about the progress made at each stage of the process. Ideas were

*have been built for exactly this reason. These dashboards can be applied to any sales and support environment, out of the box, to enhance management and exception reporting from the get-go."*

With data that is now easily and readily available, Spiralsoft has been able to pin-point various challenges that arise when conducting deals, essentially enabling sales to move to the next stage more efficiently by using informed and timely internal discussions.

*"This has enabled us to establish a higher quality of relationship with both potential and current customers,"* continues Becker.

## About New Era Solutions

Founded in 1999, NES began with a core focus on ERP (Enterprise Resource Planning) implementations in the Financial Services and Distribution sectors. Our customer base has broadened significantly and, today, most of our customers fall into the Distribution, Manufacturing, Retail and Service-Based sectors.

At NES, our sole purpose is to improve the lives of our customers by transforming software into innovative solutions that provide total control and a firm foundation for growth. We believe in building long-term relationships with our customers, inspiring trust, open communication and the assurance that we will continue to add real, tangible value to their businesses.

NES fully understands the needs of our customers and drives full-lifecycle implementations of complete business solutions for medium and large businesses in this space. We deal with a variety of customers across South Africa, the United Kingdom and North America.

NES specialises in integrated and customisable IT solutions, partnering with global specialists in ERP, Customer Relationship Management (CRM) and Mobility. We offer a single-source solution where customers benefit from one seamless working relationship that has established a strong network of connection.

## About Salesforce

Globally, Salesforce is the leading CRM platform in the market, and is a cloud-based solution that can scale from one user to thousands of users. It also covers all aspects of Customer Interaction, from Marketing to Sales and Service.

Sales Cloud is the most widely used of Sales Tools and Sales Automation Software, speeding up and streamlining all phases of sales from Lead Management to Analytics and Forecasting. Thanks to Sales Force Automation (SFA) from Salesforce, more than 100,000 clients and two million subscribers worldwide can **manage people** and processes more effectively. It also allows clients to pursue more business in less time and close more deals.

Salesforce aims to transform your customers' experience using intelligent service conversations. From the Contact Centre to Self-Service Communities, as well as social media and beyond, they strive to make your agents smarter and your customers happier by connecting them on one service platform. Salesforce works with companies across every industry and company size. Their customers are redefining success reporting, and, on average, there is a 35% increase in customer satisfaction. Ultimately, Salesforce has proven to be an immensely valuable asset to NES, and our valued customers

shared and discussed, questions were raised and answered, and processes were re-engineered to ensure the best possible solution configuration for Spiralsoft.

Becker encourages the partnership with NES, stating that *"We would recommend NES to anyone that is new to Salesforce."*

## What will the future hold?

Spiralsoft is confident that, through Salesforce, there will be an increase in its sales quantity and streamline its processes even further. *"The future goal is to utilise Salesforce to compile strong marketing campaigns and gain accurate reporting. This will assist Spiralsoft in formulating a compelling marketing strategy when going public with future products,"* concludes Becker.