Xactly Uses SnapLogic to Unify Business Applications, Create a Quote-to-Cash Orchestration

CHALLENGE

Xactly needed to connect its growing number of cloud-based business applications to eliminate data silos, thereby increasing productivity and enabling staff to make customer satisfaction a priority.

SOLUTION

The SnapLogic Elastic Integration Platform allowed Xactly to quickly and easily connect Salesforce®, Workday®, NetSuite® and more, creating a single system of systems and delivering a complete view of the customer lifecycle.

SNAPS USED

- Salesforce
- Workday
- NetSuite OpenAir

RESULTS

- Unified data across Salesforce CRM, Workday Financial Management and Workday Human Capital Management (HCM), and NetSuite OpenAir applications
- Enabled Domo business intelligence to access the company's full range of business and customer data
- Provided a seamless view of customer data to all teams
- Significantly improved staff efficiency by eliminating the need for duplicate data entry
- Supported a competitive advantage by enabling Xactly to respond more quickly to customer needs, ensuring customer satisfaction

> *We evaluated a number of iPaaS vendors, and SnapLogic stood out for its ease of use, flexibility, functionality and cloud-based architecture.*
>
> **Bob Genchi**, Senior Director of IT at Xactly

Challenge

Xactly is a provider of cloud-based incentive management solutions. The company's solutions help customers take control of their incentive processes and inspire top performance from their sales teams. The demand for Xactly incentive management has catapulted Xactly into a leader in its market.

As Xactly grew over the last decade, the company's IT team took a "cloud first" approach to business applications, deploying Salesforce for customer relationship management; Workday for finance and human resources; Domo for business intelligence; NetSuite OpenAir for professional services management; and so on. The growing number of applications began causing siloes of information that were impacting Xactly's ability to move quickly and provide the best possible customer experience.

One of the biggest issues Xactly faced was that prospect and customer data in Salesforce was not connected to contract and billing information within Workday or the professional services projects in NetSuite OpenAir. There was no single customer view and each of these applications required repetitive and manual data entry — wasting valuable employee time and resources.

Solution

With a vision to create a single system of systems, Xactly Senior Director of IT Bob Genchi turned to the SnapLogic Elastic Integration Platform, an integration platform as a service (iPaaS) that would help them create a hub-and-spoke model that would let the applications work together seamlessly. The SnapLogic iPaaS would serve as the foundation used to automate integrations between Salesforce, Workday, NetSuite and Domo, among other business applications and corporate data sources and systems.

Xactly's initial project was to deploy SnapLogic Snaps for Salesforce, Workday and NetSuite OpenAir. SnapLogic Snaps are modular collections of integration components built for a specific application or data source. SnapLogic Snaps replace hand-coded integrations and enable developers to assemble data integration flows using a drag-and-drop interface. Using the Snaps, it took less than two weeks to integrate and automate a quote-to-cash orchestration drawing sales data from Salesforce CRM, professional services billing information from NetSuite OpenAir, and contract information from Workday Financial Management.

Xactly plans to continue its integration work using the SnapLogic Elastic Integration Platform, Snaps and the SnapLogic Snap Developer Kit in order to maximize productivity and return on all of its cloud investments, including ADP, Zendesk, EASi, Apptivo and more.

Results

The SnapLogic Elastic Integration Cloud and a selection of SnapLogic Snaps enabled Xactly to integrate disparate business applications to create a unified system to more effectively manage the entire customer lifecycle. Now, anyone within Xactly can input or access the information needed to provide outstanding customer service.

Some of the integrations and new business templates, such as the connection between Salesforce and OpenAir, completely automated formerly time-consuming manual data entry and freed resources to focus on more business-critical activities. And because all business and customer data was accessible to Domo, Xactly had improved analytics upon which it could plan future business activities.

Even with these tremendous technical benefits, Genchi comments that the company's "executive team is particularly thrilled with the access to a complete view of customer data and the competitive advantage we gain from providing top-notch customer service."
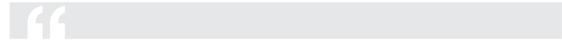
> *SnapLogic enables us to connect our applications in real time in order to create a single, comprehensive system of systems to run our expanding incentive compensation business.*
>
> **Bob Genchi**,
> Senior Director of IT at Xactly