



## CADD Microsystems, Inc.

[www.caddmicro.com](http://www.caddmicro.com)

### At A Glance:

- **Company:** CADD Microsystems, Inc.
- **Headquarters:** Alexandria, VA
- **Industry:** Professional Services; Computer Software; Architecture and Design
- **Challenges:**
  - Integrating data from 32 separate databases into one central system, while creating new data structures to better track customers — particularly government departments with complicated hierarchies
- **Software switched from:** FileMaker Pro, Microsoft Excel
- **Results with NetSuite:**
  - Global view of a customer's history allows generating on-the-fly sales and marketing reports — whenever, and wherever need be
  - Giving account reps access to a customer's full history enables them to offer new products while on the phone — creating new business opportunities
  - Managers save at least 15 minutes each day having reports at their fingertips instead of having to generate them manually
  - NetSuite's marketing campaigns and tracking features will allow the marketing team to be 50 percent more productive
- **NetSuite Partner:**
  - SkyYTEK Worldwide ([www.skyytek.com](http://www.skyytek.com)) (NetSuite 5 Star Partner 2005; NetSuite Partner of the Year 2004 and 2005)

*“With NetSuite, we're able to look at a customer more strategically. We can see what products they're using, what training and events they're attending, all at a glance. That lets us serve them better. It has also made our marketing efforts far more effective.”*

— Matt Davoren, President  
CADD Microsystems

### The Results:

Since shedding its unwieldy, antiquated 32-database system in favor of integrated, Web-based NetSuite, CADD Microsystems has not only been able to get a more complete, more useful, and far more timely look at its customers, but boost its marketing efforts, as well. “We’re doing twice as many campaigns as before, and more importantly, NetSuite automates a process that we used to have to do manually,” says Matt Davoren, president of CADD Microsystems. “The campaigns are working out very well for us.”

NetSuite also enables CADD Microsystems to better track its customers and sales — tying together information that used to exist on separate databases. “When someone calls us, either for support or for product information, we can look at NetSuite and see their whole history with us. Where we used to have all of these silos of information, now we have one consolidated view. We get the big global view we never before had.”

With all company data in one central location, reports are generated on the fly, instead of needing to be collated from different spreadsheets and databases. That saves time — several hours per week for each manager — but it also means that CADD Microsystems can make quicker, more effective decisions about how to service clients and what products to offer them. It means, too, that marketing campaigns can be better monitored. “Being able to track the response rates of our email campaigns will make the marketing team 50 percent more effective,” says Davoren. “NetSuite gets us the right information in the right way.”

### The Challenges:

A little bit of information can be a powerful thing — unless those bits of information are scattered all across an organization. That's the lesson CADD Microsystems learned a few years ago, when the number of separate, unlinked databases it used seemed to be

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— Vijay Saha  
Skyytek USA (South West)

growing as fast as its business. As one of the top Autodesk resellers in the country — and a provider of training and consulting services — CADD was using 32 different FileMaker Pro databases to store customer and sales information. It was a lot of data, in a lot of places — and it was causing a lot of problems.

"We'd have a separate silo of data for each part of the business," says Davoren. "The FileMaker Pro databases were not relational, but just islands of information. That meant a customer would call the help desk for support, but the help desk didn't know what products the customer owned. That information would be in another database, located somewhere else." The marketing department had its work cut out for it, too. "We were not able to automatically generate marketing campaigns based on products we had sold because our databases were not integrated," says Davoren. "Everything had to be done manually, pulling out data from one system or another."

By the fall of 2005, Davoren knew he had to implement a whole new solution, something that tied all of CADD Microsystems's data together, and organized contacts and information so that they provided a more global — and thus more strategically useful — view of each customer. "What worked for us five years ago, when we were half the size we are now, wasn't going to work for us now that we had doubled our size," says Davoren. "It was like running a Ford Pinto at 100 miles per hour."

In November 2005, CADD Micro began evaluating three products: Microsoft CRM, Salesforce.com, and NetSuite. This was no two-week test drive. Instead, the company ran live data sets through each package for nearly four months. "By 30 to 45 days into our evaluation, it was clear that NetSuite was the strongest package," says Davoren. "It did a better job of integrating our processes and offered a better, more flexible user interface."

There were other factors, too. "NetSuite's time-and-billing and item-list-for-parts features were particularly important for us," says Davoren. "The parts list for Autodesk is huge, and all of our sales are based on that. The other systems didn't have these features and that put them at a huge disadvantage." NetSuite's Web-based access was also a crucial factor, as CADD Microsystems planned to expand into new offices in 2007.

### The Solution:

For help in getting NetSuite up and running, CADD Microsystems turned to Skyytek Worldwide ([www.skyytek.com](http://www.skyytek.com)), who had experience in customizing NetSuite for the software industry. While moving information from 32 separate databases into one central database might seem like an almost overwhelming challenge, it was actually the easy part. Far harder — and the part where Skyytek's help proved essential — was in structuring the way data would be handled.

"We come across a lot of companies that have data silos," says Vijay Saha, president of Skyytek USA (South West). "What was challenging about CADD Microsystems was that their business is really unique, with a customer base that is largely government agencies, all



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of which have smaller bureaus and organizations within them. You have to structure the database carefully so that everything is linked in a careful, thoughtful way." But the organizational hierarchy could get extremely complicated. "When you work with the Department of Homeland Security you may be dealing with 4 or 5 major groups within that department, like the FBI, and with many more regional agencies," says Saha. "As a vendor, CADD needed to have the big picture, but it also needed to see what all the smaller parts are doing. Sometimes they would work with the top-level department, sometimes they would work with individual groups. We wanted CADD to be able to slice and dice the data every way they needed to. NetSuite lets them do just that."

The next step was to re-work the workflow processes CADD Microsystems was using. "Our core competency is evaluating and developing businesses process and workflow," says Saha. "Every company has its own dynamic, so it's important for us to come in and understand the business, then develop a workflow that integrates most efficiently with NetSuite. That's really the key to a successful implementation." Indeed, besides modifying the way CADD structured customer data, Skytek enhanced processes including time and tracking.

Although it is a new NetSuite user — having launched the system in August 2006, CADD Microsystems is already reaping rewards. "We're able to look at a customer more strategically," says Davoren. "We can see what products they're using, what training and events they're attending, all at a glance. That lets us serve them better. It's also made our marketing efforts far more effective. Marketing campaigns are no longer done manually. Now that all of our data is integrated, we're able to automatically generate campaigns. It has been NetSuite's biggest advantage so far."

Forecasting, a process that used to be done by piecing together various Microsoft Excel spreadsheets — a "manual and monotonous process," says Davoren — has been greatly simplified, as well. "What NetSuite enables us to do is follow the entire sales process, from the initial order, to phone support, to marketing efforts and results." NetSuite has also provided new ways for CADD Microsystems to grow the business. "If a customer calls the help desk a lot, our account executives will now be able to see that, and they'll know there is a problem and they can offer a training class," says Davoren. "That's just the type of opportunity we would have never seen without NetSuite."