



Document Sciences

www.docscience.com



At A Glance:

- **Company:** : Document Sciences (NASDAQ: DOCX) Market-leading global solutions provider for customer communications management.
- **Location:** Carlsbad, CA
- **Industry:** Software
- **Challenge:**
 - Needed better visibility into the sales pipeline
 - Lack of integration between MAS 200 and its various CRM applications due to acquisitions made it difficult and time consuming to identify high revenue clients, or to track software deliveries to customers
 - Needed better integration between accounting, sales and customer interactions
- **Software switched from:** MAS 200, Salesforce.com, Clarify, Microsoft Excel and Access, homegrown applications
- **Other software considered:** Epicor
- **Results with NetSuite:**
 - NetSuite's CRM established a transparent sales pipeline, leading to improved sales
 - NetSuite's ERP allowed billing for maintenance and other features not offered by MAS 200
 - Integration of all CRM and ERP functionality under one umbrella lowered company's IT costs
 - Providing real-time information and key metrics for the global organization

“Before NetSuite we would have to go through three different spread sheets to establish what exactly was happening in our global sales pipeline.”

— David Barker, Director of IT
Document Sciences

The Results: Accountability in Sales

More than 500 content-driven organizations worldwide, including FORTUNE Global 500 companies — such as Aetna, AIG, Citigroup, General Motors, Johnson & Johnson, and Merrill Lynch — use Document Sciences' solutions to reduce development costs, improve time-to-revenue, and enhance the overall customer experience with highly effective 1:1 communications.

And in the years since it has been using NetSuite for CRM and ERP, Document Sciences has had a clear view of these customers, of its sales pipeline, its customer support activities, and its financial operations, leading to improved sales activity and overall operations, says David Barker, Director of IT.

Also, the company has saved significantly in IT costs by switching its financials from MAS 200, by consolidating the Salesforce.com users brought on by acquisition on to NetSuite, and by substituting NetSuite for Clarify in the support organization. "Clarify alone was difficult and expensive to maintain," Barker says. "We paid more to support just 45 users of our old Clarify system than we do for the entire NetSuite package that we rolled out to 130 users."

The Challenges: Line By Line

As an enterprise software developer and publicly traded company that enables financial institutions to create and automate the delivery of regulated communications, Document Sciences occupies a very specific niche: prospective customers could include insurance companies that want to speed delivery and improve accuracy of policies and proposals to insurance agents, large regional bank systems that want to generate mortgage loan documents, or a broker that needs customer-specific marketing prospectuses.

Unfortunately, because it had no central sales force automation system, the company had little visibility into these diverse sales activities. "We were using Excel spreadsheets and an Access database," Barker says. "These would get updated by different managers at different points in time. Prospective deals could easily be 'lost track of' from these spreadsheets, thus hindering our ability to correct the sales processes when needed. If we wanted to track a particular deal we had to follow the item line by line from the previous spreadsheet."

Another problem was duplicative customer data, he adds. "Customer information was entered into the sales pipeline tracking database, as well as in our order processing

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database, in our MAS 200 database and then once again, in our Clarify service database." In short, he says, "it was a different customer record depending on whose view you were using."

Further adding to the challenges was the fact that Document Sciences acquired multiple companies, each with their own CRM that included products such as Salesforce.com.

A lack of data and systems integration between accounting, sales, order management and customer service became a serious problem. This made it difficult and time consuming to identify high revenue clients, or to track software deliveries to customers.

Most importantly, upon leaving the organization, many sales reps would take their contact data with them, leaving Document Sciences with partial records. "Unfortunately, there was no central repository for the sales information, so it was easy for such things to happen."

The Search for a Solution

At first Barker did not expect to find an integrated solution that would connect these disparate business processes. "I was about to sign with Salesforce.com — as one of the companies we acquired had done — even though they only offer CRM. Then I found NetSuite, which offers accounting as well — and at a lower price point."

Document Sciences has been using NetSuite for CRM, including sales force automation and customer support, since 2003. The company rolled out NetSuite for financials the following year.

"There were many things MAS 200 did not offer, including billing for maintenance and other features," Barker says, "but NetSuite does. We have benefited very much by having it all in one system."

The Solution: Seamless Information Flows

Document Sciences has realized greater efficiencies in many areas as a result of using NetSuite for its complete CRM and ERP. "There is greater accountability in sales now," Barker says. "There have also been substantial improvements in our operations because of the implementation."

For example, the company has been able to identify new sales and customer reference opportunities by having an integrated customer database. "We are doing a better job of capturing data now, which means we can start looking for new sales opportunities within our customer base." Also, because the company has gained a better understanding of exactly how its customers are using its products, it has been able to offer prospective customers much better references — an invaluable sales tool.

"One of the constructs I created using NetSuite's Custom Record helps me easily identify examples of very specific product usage. So if I want to find a company that is using our software to run booklets on an IBM zSeries platform, all I have to do is run a quick search."

Barker points to the system's Dashboard as the perfect illustration of the efficiencies the company has gained since it went live with NetSuite. "The metrics, which can be tailored for each division, give management much better visibility into our operations. Before it was difficult enough to just gather the data — much less gather it in one place. Now, not only do we have all the necessary information, but we can customize its presentation according to our needs and view it in real-time."



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