



## Neoware

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



### At A Glance:

- **Company:** Neoware
- **Location:** King of Prussia, PA
- **Industry:** Computer/IT Services
- **Challenge:**
  - Update obsolete CRM system with a Web-based platform that provides global sales staff with real-time information on leads and customers
- **Software switched from:** Goldmine
- **Other software considered:** Pivotal, Salesforce.com
- **Results with NetSuite:**
  - Sales representatives now have real-time access, from any PC, to leads and customer histories, facilitating their ability to close deals
  - Processes such as forecasting, lead distribution, and sales-quote approvals are now automated — saving time while reducing errors

*“By putting everything online, in an easy-to-customize, easy-to-access system, NetSuite not only gives us an improved ability to track our business, but has also made us much more efficient.”*

— Mack Ziegler, Director of IT  
Neoware

### The Results:

Since it went live in August 2006, NetSuite has provided Neoware with several key benefits. First, there is no expensive, custom hardware to support. As a Web-based system, NetSuite handles all the technical nitty-gritty on its own servers, leaving Neoware free to focus on its business — not technical support. Perhaps even more importantly, sales team members around the world have real-time, up-to-date information on leads and sales, helping them better guide prospects — and existing customers — to the right products and support.

Finally, by automating key processes — such as lead distribution and sales-quote approvals — NetSuite has enabled Neoware to work faster, yet more accurately. Leads, and sales no longer fall through the cracks, as they did when tasks were done manually.

"By putting everything online, in an easy-to-customize, easy-to-access system, NetSuite gives us an improved ability to track our business," says Mack Ziegler, director of IT at Neoware. "When your processes are manual, you lose some measure of accountability. NetSuite gives us the full view — and has made us much more efficient."

### The Challenges:

When Neoware began looking for a system to replace its existing CRM package, Goldmine, one point was non-negotiable: the company did not want to maintain hardware. To those who knew Neoware, it wasn't much of a surprise. As the leading provider of thin clients — solid-state devices that run applications via a network and contain no disk drives — it's all about keeping things simple. Neoware helps companies like CVS, Barclay's Bank, and Bed Bath & Beyond run sophisticated programs on secure, easy-to-maintain hardware. With 180 employees in the U.S., England, France, Germany, Australia, and China, Neoware was seeking global sales — not global tech-support problems.

"The Software-as-a-Service model just made sense for us," says Ziegler. "A Web-based

 **Find out more: contact NetSuite, Inc. at 1 877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com)**



*“What NetSuite gives us is a full view of our processes, our customers, and our business. That's a big advantage for any company. And it's huge for us.”*

— Mack Ziegler  
Director of IT  
Neoware

package means that our employees can log on and get the information they need from anywhere, on any computer.”

Lessons learned from Neoware's experience with Goldmine led to other requirements. Key among them: speed. With Goldmine, sales representatives updated prospect and customer information on their local machines, but because changes were synchronized with Goldmine in a batch process, it would take as long as 24 hours before the rest of the company saw the changes.

The new system would also need to handle customer hierarchies better. “We sell to end customers, but we also sell to distributors and resellers, so we need to know not only who a sale is to, but who the sale was made through,” says Ziegler. Neoware needed an easier, more robust way of processing leads, as well. With Goldmine, salespeople were notified of new leads not in real-time or self notification, but only after a batch process.

Now the trick was to find a package that fit all of Neoware's criteria. The search wasn't easy. Pivotal was too expensive; Salesforce.com, the company feared, would mean burdensome integration issues when Neoware tried to tack on features.

NetSuite not only offered anytime-anywhere Web access, but also flexibility. Information could be updated, enterprise-wide, instantaneously, and the package could be customized, with dashboards and rules, to make sure the right people got the right information — right away. “What NetSuite offered was better availability of information that could really help us, like forecasting. Instead of flowing everything into a spreadsheet, we could just log in and look right at a forecast. In short, NetSuite could help us be a lot more efficient.” says Ziegler.

### The Solution:

For Neoware, the two key benefits of NetSuite have been quick access to information, and flexibility. Leveraging NetSuite's easy customization, Neoware has been able to set the package to work in ways that helps it do business faster, more accurately, and more efficiently. For example, the company's sales staff can negotiate prices to a certain threshold — beyond which, they need corporate approval. Traditionally, these approvals were done manually, a time-consuming process that required emails to go back and forth between the sales representative and his or her manager. But working with NetSuite Professional Services, Neoware was able to automate the process, creating a Java script for a special-price-quote feature. “Now approvals can be done right online,” says Ziegler.

By customizing NetSuite's user dashboard, Neoware was also able to simplify — and improve — its sales flow process. Leads that come in via forms on Neoware's website automatically flow into NetSuite, where custom rules direct them to specific sales representatives. “Now when our salespeople look at their dashboard they see all of their current leads, in real-time,” says Ziegler. “With Goldmine, they were notified only after a batch process. The ability to have all of the information right on their dashboard, immediately, is a big improvement. Leads are no longer getting lost in the shuffle. NetSuite makes it all seamless.”

With real-time access to the most current customer data, Neoware's sales staff is also able to see a customer's entire history: what products they have looked at, what products they have purchased, what support issues they have had. “They are able to meet their customers' needs better, and see new sales opportunities,” says Ziegler. Forecasting, which had previously been a manual process — with information flowed into spreadsheets — is now automated in NetSuite. Neoware's operations staff simply logs in and looks at the forecasts NetSuite generates.

 Find out more: contact NetSuite, Inc. at 1 877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com)

