



CaseCentral

www.casecentral.com



At A Glance:

- **Company:** CaseCentral
- **Location:** San Francisco, CA
- **Industry:** Computer Software;
High Tech Services
- **Challenges:**
 - Integrate CRM features with financials
 - Keep a sharper eye on technical-support volume and trends
- **Software switched from:**
QuickBooks, eTrakker (custom production-tracking software)
- **Other software considered:**
Microsoft CRM, RightNow
- **Results with NetSuite:**
 - With incoming calls now better tracked and analyzed, increased customer support productivity by 25 percent, resulting in yearly savings of up to \$80,000 from 2003 to 2004
 - Time required to close books each month reduced by 25 percent
 - Billable assignments now better tracked and integrated with invoicing

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The Results:

Since switching to NetSuite, CaseCentral has been able to track both the frequency and subject of incoming support calls. As a result, CaseCentral now more efficiently handles incoming calls and the company is able to make better-informed staffing decisions. “We can look back and see all the ebbs and flows, see what time of year we get a lot of calls, and what time we don’t,” says Brian Lanouette, senior manager for business system integration at CaseCentral. “It gives us hard data that lets us prepare.”

CaseCentral was able to capitalize on the efficiencies gained via NetSuite when a customer support representative resigned. The company determined the employee did not need to be replaced due to the improved efficiency of the support group. “In the past, we’d automatically replace that person,” says Lanouette. “But with NetSuite improving our productivity by 25 percent, a replacement was not warranted, so we were able to save between \$75,000 and \$80,000.”

NetSuite has also helped CaseCentral close its books faster each month. “In the past, it would take us 10 to 12 business days to close the books,” says Lanouette. “Now it’s 8 to 10, and we’re working to get it down to 5 to 7. “The ROI is off the chart.”

The Challenges:

No one has ever had to convince CaseCentral of the merits of a hosted ASP solution: Its whole business is based on that model. The San Francisco-based company provides litigation and case management services for law firms—it has worked with 81 of the top 100 US law firms—enabling them to go online to access, search, review and manage their case documents. “We know the benefits of using an ASP solution, so it made sense that when we looked for a new system to run our own business, we’d look at an ASP,” says Lanouette.

There was another argument to go with an ASP, as well: CaseCentral, due to its rapid growth, had outgrown its existing solutions, a variety of applications running on

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CaseCentral’s own servers. The company was using QuickBooks for its financials and a custom-built system called eTrakker to track the work it was doing for clients. “The problem was that eTrakker was built at a time when our business was much simpler,” says Lanouette. “Back then, when clients called us they had a fairly narrow set of requests. Now the jobs are much more complicated and involved. There’s more data management and data processing, and eTrakker couldn’t keep up.”

Nor was eTrakker meant to function as a CRM product. “We couldn’t easily monitor how many calls tech support was getting each week,” says Lanouette. “The information would have to be entered manually into the system, and that was too burdensome.” Worse, since eTrakker was a client-server solution, updating it would be a time-consuming—and costly—process. “We’d have to hire someone who knew SQL Server and Microsoft Access and could re-do all the business logic.”

CaseCentral looked at solutions including Microsoft CRM and RightNow, but opted instead for NetSuite. “In the end, NetSuite had the better overall solution,” says Lanouette. “The integration between financials and CRM was tighter, and the price was more attractive. But the fact that it was so easy to customize was the big seller. We use a fairly complex data structure but NetSuite let us set that up easily and it’s worked out great.”

The Solution:

While CaseCentral was able to replace QuickBooks with NetSuite for financials, the real gain has come from the way NetSuite can integrate its CRM features with financials. For example, when a client wants certain work done—such as documents loaded, printed, or moved around—a job is created in NetSuite and assigned to the appropriate employee, who keeps track of the work in NetSuite. That information is then automatically integrated with invoicing. “Before we’d have to manually pull out all that information for invoicing,” says Lanouette.

NetSuite’s Opportunities feature has also proved powerful. “With it, we track contract terms with our clients, so we know how to bill them,” says Lanouette. “For example, the contract terms will tell whether the work should be billed by the hour, or by a unit-based rate. NetSuite not only keeps tabs of the work, but automatically knows how to bill for it, and then integrates it all with invoicing.”

NetSuite has also allowed CaseCentral to offer more efficient, and effective, customer support. “NetSuite lets us track the calls we get from customers, which lets us track any problems they may be having,” says Lanouette. “It’s a huge help to be able to easily spot trends. We’ve never had that ability before.”

More capabilities—and more benefits—are to come, according to Lanouette. “NetSuite hasn’t just given us a product, but a relationship. It’s a big selling point that they listened to our suggestions—like email notification when a user gets assigned to a new matter—and are incorporating them into the next version.”

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