

Informatica/NetSuite at the Australian Institute of Management



Australian
Institute of
Management

Company Name:

Australian Institute of Management

Industry:

The non-profit Australia Institute of Management, with 20,000 members and \$75 million in annual revenue, delivers training and resources to build management and leadership skills for commerce, industry and government.

URL:

www.aim.com.au

Headquarters:

Sydney, Australia



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Challenge:

Transitioning from on-premise applications to a cloud business environment, AIM needed a simple, cost-effective cloud solution to connect NetSuite ERP and Salesforce CRM.

Solution:

First deployed at the AIM NSW/ACT division, Informatica Cloud enables seamless bi-directional integration between NetSuite and Salesforce, with extensibility across the broader organization as previously standalone divisions merge in January 2014.

Results:

AIM NSW/ACT is giving its sales reps a real-time, 360-degree view of customers and leads to improve sales and service effectiveness, while streamlining processes such as sales orders, invoicing and revenue recognition.

Informatica's native cloud connectivity between NetSuite and Salesforce.com streamlines processes and prepares non-profit organization for restructuring

With more than 20,000 members, the Australian Institute of Management (AIM) helps drive business success through education in management and leadership for commerce, industry and government. Founded in 1941, the non-profit organization delivers more than 120 training courses and a range of certifications and resources to equip Australian organizations with the skills needed to excel.

After decades of helping corporate and personal members strengthen management practices, AIM is investing in its own future with a pair of complementary initiatives—a transition from on-premise applications to a cloud business environment, and a historic merger of standalone divisions across Australia approved in November 2013.

A foundational element of these initiatives is the new cloud business environment powered by the combined solution of NetSuite's cloud ERP and Informatica Cloud, the multitenant cloud integration solution from NetSuite SuiteCloud Development partner Informatica. First deployed at AIM's New South Wales/Australian Capital Territory (NSW/ACT) division in November 2012, the joint NetSuite/Informatica solution will be extended across all the merged divisions as AIM's restructuring unfolds.

Greater Efficiency and Visibility

At the AIM NSW/ACT division, based in Sydney, Informatica Cloud serves as the "glue" for data synchronization between NetSuite ERP and Salesforce.com's CRM solution, Sales Cloud. With Informatica Cloud, AIM NSW/ACT has been able to maximize its value from NetSuite, which replaced a Microsoft Dynamics GP (Great Plains) system, and Salesforce.com, which replaced Saleslogix.

"Informatica was the most solid integration tool we evaluated, with the best price point, lowest learning curve and native connectivity to NetSuite and Salesforce," said Edward Austin, Senior Solutions Architect at AIM NSW/ACT. "The overall solution with Informatica and NetSuite enables us to operate more efficiently and with greater visibility."

With Informatica synchronizing data bi-directionally between NetSuite and Salesforce, AIM NSW/ACT is giving its sales representatives a real-time, 360-degree view of its customers and leads, resulting in improved sales effectiveness and higher revenue in cross-selling products and services. The solution also delivers improved efficiency across related sales-to-cash processes—for instance, a sales opportunity that closes in Salesforce automatically updates financial records and generates an invoice in NetSuite.

 To find out more, contact NetSuite Inc. at 1-877 NETSUITE or view the solution at SuiteApp.com

“As part of a multimillion dollar, cloud-first IT transformation strategy, the Australian Institute of Management had a mandate to adopt cloud applications across all our locations. We started by implementing Salesforce for CRM, and NetSuite for cloud ERP in the Sydney office and needed both applications to talk to one another seamlessly. Informatica Cloud was instrumental in making this happen on time and under budget. The Australian Institute of Management will be using the success of this integration project as a blueprint to expand our cloud-first strategy to all our other locations.”

—Edward Austin
Senior Solutions Architect
Australian Institute of Management
NSW/ACT

“As AIM has found, the overall ROI of cloud applications can be enhanced by eliminating the integration obstacle without a lot of laborious and expensive hand-coding.”

—Ronen Schwartz
VP and GM, Informatica Cloud

By moving to an integrated cloud environment, AIM NSW/ACT has eliminated time-consuming manual work and custom-coding required with its previous Microsoft Dynamics GP and Saleslogix applications. In addition, mobility in the cloud has extended anywhere, anytime data access to sales personnel and other professionals while not in the office.

Dramatically Simplified Revenue Recognition

As one example, AIM NSW/ACT has dramatically streamlined its revenue recognition processes. Previously, the organization resorted to spreadsheets to manage diverse streams with different recognition schedules (i.e., a student might book a training course but AIM couldn't recognize that revenue until the course was taken). With NetSuite's sophisticated revenue recognition, AIM saves several days a month in manual work.

“Revenue recognition used to be a very manual process with spreadsheets that was quite difficult,” said Austin. “Now with NetSuite, we have much better visibility and consistency on when we can recognize revenue.”

Implemented by Fronde, an Australian NetSuite Solution Provider partner, the cloud solutions at AIM NSW/ACT can be readily extended to supply a single, standardized environment across new entity of merged divisions, including Queensland/Northern Territory, South Australia, and Victoria/Tasmania. A fifth Western Australia division will remain a separate body with a commitment to work closely with the merged divisions.

A cloud environment was an ideal fit given AIM's merger plans and its resource limitations, Austin said. With incremental deployment that builds on the NSW/ACT division's success, cloud solutions will be replacing various on-premise systems run individually by the merged entities and AIM's 10 offices around Australia.

“We don't have a large IT team, so it made sense to go with cloud solutions, and we have better reliability without having to maintain servers internally,” Austin said. With Informatica Cloud, the organization also has flexibility to deepen integration across other components in its cloud architecture, including a Tableau visual data analytics system and a Marketo marketing application.

“With Informatica Cloud and the open APIs in NetSuite and Salesforce, we can also easily bring in additional third-party applications,” Austin said.

Ronen Schwartz, VP and GM of Informatica Cloud said that AIM is successfully solving the integration challenge that confronts many organizations running disparate cloud and on-premise applications for such functions as ERP and CRM.

“Informatica Cloud abstracts away a lot of web services complexity to easily integrate systems together,” Schwartz said. “As AIM has found, the overall ROI of cloud applications can be enhanced by removing the need for expensive hand-coding and using simplified and streamlined data integration with a complementary cloud integration solution.”

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