

LeadAbroad Uses CloudExtendInsights to Save 1,500 Hours a Year

Customer
LeadAbroad

Product
ExtendInsights for NetSuite

About

Founded 12 years ago, LeadAbroad is a study abroad company that provides transformative overseas experiences for students from over 75 colleges. Traveling to countries such as Spain, Italy, and Greece, the company has provided life-changing summer trips for over 4,000 students. As a smaller, boutique study abroad company, LeadAbroad provides a much more personalized experience -- incorporating leadership skills and personal development curriculum, as well as community services. By leading transformative experiences, LeadAbroad believes they can change lives, impact communities and create a better world.

Background

As a small business, everyone at the company wears multiple hats. However, the Chief Financial Officer (CFO) is the only person who handles every task related to accounting work. A big focus of his job is data analytics and data integrity review. LeadAbroad is very data-driven, and generate multiple reports every week that assist with influencing interactions with thousands of students around the country.

The Challenges

Prior to using ExtendInsights, the CFO would have to rely on several time-consuming processes multiple times a week. For example, when updates to NetSuite data were required, he would have to manually pull data from

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I use ExtendInsights every day, multiple times a day... it saves us at least \$50,000 per year in additional payroll, if not more, and the quality is better than a human is capable of.

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Marc Smith
Chief Financial Officer
LeadAbroad



LeadAbroad

Website
leadabroad.com

NetSuite, review in Excel, then either utilize the mass update function or individually update each record. With over 18,000 potential customers in the system and dozens of data points, LeadAbroad needed a more accurate method to make decisions on how to interact with students who are looking to join the study abroad program.

With regard to data integrity, the company would have to manually check NetSuite multiple times a week just to make sure their team was acting on the latest records. Spending so much time on manual data entry or corrections instead of analysis was very frustrating for busy employees.

The Solution

As a result of a suggestion from the CEO, the CFO started a free trial of ExtendInsights. Once the team at LeadAbroad started using ExtendInsights, it immediately became apparent that it would have a significant impact. The CFO is now able to skip through the manual and time-consuming task of identifying dozens of custom fields that need updating by leveraging NetSuite saved searches to deliver just the data that needs to be changed into Excel. Once in Excel, the data can be changed and immediately pushed back to NetSuite.

The entire data integrity review process has also completely changed for the better. Previously, it took a full day of someone's time each week to review data in NetSuite -- which wasn't very efficient nor effective. With ExtendInsights, it only takes about an hour every week, and they're able to update a lot more information than before. As the company grows in the future, the app can also empower other employees to update their own data instead of having to rely on accounting.

The support LeadAbroad has received from the CloudExtend team has been first class. As LeadAbroad continues to grow, they know that putting ExtendInsights in place will help new users get trained and up to speed more quickly.

Bottom Line

With ExtendInsights, LeadAbroad is able to save a huge amount of time and resources by being able to manage NetSuite data directly from within Excel. The CFO uses ExtendInsights every day, multiple times a day, and is an integral part of his daily tasks and responsibilities. Over the past 3 years, he estimates that ExtendInsights has helped the company save at least 1,500 hours a year. LeadAbroad has been impacted by the global pandemic due to all of the travel restrictions, so any time the company can be more efficient and save significant time is a big plus as they navigate their business through these difficult times.



I can't imagine operating our business without CloudExtend. From pre-sales to post sales and support my experience with CloudExtend has been wonderful. I really appreciate the continual investment in improving the app. What's already good keeps getting better.



Marc Smith
Chief Financial Officer
LeadAbroad

About CloudExtend

CloudExtend email and spreadsheet applications integrate top business applications to help organizations increase productivity and extend the value of applications they use every day.

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