

## InSource Solutions Uses ExtendSync to Improve the Client Experience and Save 200 Hours Per User/Year

Customer  
InSource Solutions

Product  
ExtendSync Outlook for NetSuite

### About

Founded in 1997, InSource Solutions provides software and services to manufacturers with the goal of digitizing and improving their industrial operations. Many of their clients are global and well-known manufacturers of both consumer and business products. They work with many Fortune 500 companies in various industries. Based in Richmond, VA, InSource Solutions has a passion for manufacturing with the aim of revitalizing manufacturing in America.

They also work hard to correct misconceptions about manufacturing while reviving interest. They reach out in their communities to educate and support the next generation of manufacturers.

### Background

With 70% of the company working remotely and with the goal of providing a seamless client experience, InSource Solutions relies heavily on NetSuite, their customer relationship management (CRM) tool. When their clients reach out, they do not want them repeating the same information to various groups within the company. This is extremely important because there are so many different and intricate components in the manufacturing industry, and they all need to align for a successful business outcome.

### The Challenges

As a NetSuite customer since 2014, InSource Solutions needed to find an

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Tom Barczak  
Chief Information Officer  
InSource Solutions



improved version of the native email logging tool within NetSuite. They initially used a competing product for a few years, but subsequently experienced various issues. The tool was not seamlessly integrated and they discovered that different departments within the company did not have the organizational visibility to important communications.

For example, the accounting department would keep track of contact information and invoices on a piece of paper on someone's desk. With the goal of connecting the company with improved technology, the CIO knew they had to find a better solution. He initially met the CloudExtend team at SuiteWorld, and when he saw the demo and its capabilities, he immediately knew it was light years above anything they were currently using.

## The Solution

With ExtendSync, InSource Solutions is now able to expand on additional business use cases throughout different departments within the company. One example is that they can now start using the tool in the accounting department because they can connect to invoices. The purchasing department is able to use the Outlook and NetSuite integration app because it connects to purchase orders.

The services and consulting groups can now log emails to multiple projects and effectively keep track of all previous communication. The client success team can seamlessly connect to customer records within NetSuite. After recently restructuring the entire company as well as the need to exchange many emails, ExtendSync played a big role in providing newly onboarded account managers with a clear picture of past correspondences with customers.

InSource Solutions also uses the Autopilot feature -- which allows all subsequent emails in a thread to automatically be attached to the same set of records email once an initial email is attached to a NetSuite record. This helped eliminate a lot of manual work and played a significant role in saving the company approximately 4 hours per user, per week in overall efficiency. With ExtendSync, the company also initiates customer and contact information, a task which they did not do before.

## Bottom Line

By using ExtendSync, InSource Solutions is able to have a clear picture of communication within the CRM without the need to rely on information written on a piece of paper. As a small company with approximately 60 employees, everyone wears multiple hats, so every hour saved is extremely valuable. According to the CIO, ExtendSync has proven to be a great investment for their organization and helps complement their mission to deliver an excellent client experience.



Autopilot has made my life a lot easier. There are a lot of back-and-forth emails that begin with a single thread. ExtendSync eliminates a lot of manual work and saves the company approximately 200 hours per user/year.



Tom Barczak  
Chief Information Officer  
InSource Solutions

### 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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