

Mentoring Minds Leverages ExtendSync to Remove Communication Silos, Improve Productivity, and Provide Visibility into Business Activities

Customer
Mentoring Minds

Product
ExtendSync for Outlook
CRM: NetSuite

About

Lisa and Micheal Lujan founded Mentoring Minds in 2002. Micheal Lujan was an assistant principal at the time and he wanted to take his expertise and build the tools that would help students learn how to learn. Backed by a staff of past and current educators, teachers, administrators, curriculum directors, Mentoring Minds has grown into an international company that publishes educational material to teach children all over the world to think critically.

Background

At Mentoring Minds, the inside and outside sales teams, as well as the customer team utilizes NetSuite. The company's data is stored there, including customer and prospective customer communications. Each team member was responsible for making sure that important emails and attachments were added to NetSuite, but the process was time-consuming and manual, so often, information did not make it in, or if it did, it was added in the wrong place. They wanted to secure a solution to ensure that all communication was added so that they could remove silos and provide visibility across their teams. They also wanted to make this process far less manual so that they could improve productivity and gain better insights into their business.

The Challenges

At Mentoring Minds, the inside and outside sales team and customer success

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At first the sales team was skeptical to use it because of our previous process, but once they saw that adding information to NetSuite with ExtendSync is truly only a few clicks, as well as the resulting enhanced visibility - now they really see the value from a time savings standpoint. The volume of insight ExtendSync provides is significantly increased over our previous process.

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Gavin Rasco
Principal, Corporate Systems
Mentoring Minds

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team took a three-pronged approach when working with customers and prospective customers. The outside sales agent was on the frontlines and then an inside sales rep would support them. A customer success team would support both sales teams, handling calls about transactions and providing information about their products. Each group was responsible for entering relevant information into NetSuite to provide visibility to the other groups. This process was not much of an issue in the early stages, but over time with three different departments working on different portions of the life-cycle of an account, it started to create three different silos.

It was a very manual, inconsistent process in terms of getting transparent communication on the customer account. As Mentoring Minds grew and more team members were entering this information, problems started to develop. One issue was that users might not put information into the right place in NetSuite. For example, a user note might be added when it should not be or an email might not always be logged as an email. Reps might undervalue the importance of a piece of communication, because it took so much time and effort to add it, so they might just omit it. The other issue was that when they were on the road visiting schools, they would be required to log into NetSuite in their car and then add information, which was very difficult to do.

The Solution

Mentoring Minds needed to get all relevant communication into NetSuite, so that team members didn't have to email someone else to get important data they needed. They wanted their team to be able to use NetSuite as their source of truth and find what they were looking for.

The ExtendSync solution allows Mentoring Minds to increase productivity and efficiency, remove silos, and gain insights into their business for better decision making.

Bottom Line

With ExtendSync, Mentoring Minds has gained business insights such as how many engagements led to converting a prospect to a customer and what took customers from low-tier to high-tier. They have gained a holistic picture of customer engagement and what ultimately led into the tipping point.

Mentoring Minds has also leveraged ExtendSync to remove communication silos. Information can be added to NetSuite with a click of a mouse, so efficiency and productivity increased because there is no longer copying and pasting or hoping that team members do so. ExtendSync has been a significant time saver at Mentoring Minds.



It stems from this idea that we want to see what influenced a customer to purchase, so as we build out those models, it is instrumental in helping us see what the tipping point was. One of our key metrics is the volume of emails and quality of emails and without ExtendSync we wouldn't be able to see that.



Gavin Rasco
Principal, Corporate Systems
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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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