

## A Word of Mouth Referral Saves SalesLoft's Accounting Department Over 40 Hours a Week

Customer  
SalesLoft

Product  
ExtendInsights for NetSuite

### About

SalesLoft's Modern Revenue Workspace has the most critical tools for digital selling. It's the one platform that sellers can go to execute and exceed on goals including communicating with buyers, understanding next steps, receiving coaching and getting more insights that lead to more closed deals. Some of the features available: automation and cadence, auto-dialer & messenger, deals, conversations and analytics with reporting.

### Background

SalesLoft is a sales engagement platform founded in September 2011. Though its original product offering focused on sales development, the company has since expanded its platform to offer functionality for the entire sales organization. SalesLoft has more than 2,000 customers using their sales engagement platform including Square, MuleSoft, Alteryx, and Dell. Based in Atlanta, Georgia, with additional offices in San Francisco, New York, and Guadalajara, Mexico, SalesLoft has more than 700 employees and was recognized as the #1 best place to work in Atlanta.

### The Challenges

The SalesLoft Accounting team was manually updating all of their sales orders and customer payments, and it was a time-consuming process involving over 40 hours a week. As the company grew and expanded, the accounting department

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A SalesLoft employee had experience with ExtendInsights from using it at a former company. He convinced us that there was a better way to update our sales and payment data and we couldn't be happier with the outcome.

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Shady Hadid  
Senior Revenue Accountant  
SalesLoft

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contemplated adding an additional employee to handle the workload, but they wanted to educate themselves on all of the available options before adding an additional resource. Being a SaaS company, they began to wonder if there was a way to change this process to scale with their growth.

## The Solution

At the recommendation of an employee who had familiarity with ExtendInsights for NetSuite from a former job, SalesLoft decided to trial the CloudExtend Excel data management app. They immediately saw that the app would allow them to process their accounting data in a fast Excel environment while also improving the accuracy of their accounting data. There was no disruption to the business and immediately SalesLoft received a return on investment for time and resources. The biggest and most important benefit was that morale was boosted after increasing the accuracy of their data and saying goodbye to a time-consuming manual process.

## Bottom Line

Implementing ExtendInsights for NetSuite didn't interfere with the SalesLoft Accounting Department output at all. It helped it to become a scalable process. SalesLoft is growing at an accelerated pace, and processes must be fast and accurate to meet growth demands. Manually approved sales orders and customer payments are a thing of the past, and the quality of NetSuite data is increased by reducing human errors. ExtendInsights for NetSuite enabled SalesLoft to use powerful native Excel functionality to create new records and update existing NetSuite data directly from within Excel. There is also easy security since roles and permissions are enforced by CloudExtend.



Rather than spending 40 hours a week on tedious data entry tasks, I can do it for only an hour of my day. ExtendInsights has made a huge difference in time saved and improved the accuracy of our data.



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Senior Revenue Accountant  
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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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