celigo

SAFIO Solutions speeds up time-to-value for its customers using versatile integration solutions from Celigo

Customer
SAFIO Solutions

Segment
SaaS vendor for ecommerce and supply chain

Product
Integrator.io to connect customers' SAFIO Solutions instances to Forecasting & Demand Planning, Business Intelligence, and e-Commerce applications

About

SAFIO Solutions provides a cloud-based, forecasting software solution for inventory optimization. Founder Audrey Walby created the software nearly twenty years ago, when she realized there was a tremendous need for an accurate, efficient, comprehensive tool for making the process of forecasting more effective. The software connects all channels of data and integrates a clients' vital sales and inventory information into a platform that enables the vision and efficiency to make strategic decisions that optimizes inventory and improves the overall performance of the company.

Background

As a growing company based in Wisconsin, SAFIO Solutions had one major issue: quickly integrating the clients multiple channels of data into their solution. This information could come from many sources including the clients ERP, Excel files, QuickBooks, an e-commerce marketplace like Shopify, Amazon and more. As this capability was mission-critical to SAFIO Solutions and their customers, they originally partnered with an integration provider who fell short of the need. They needed a replacement that would help them improve customer experience, be cost-competitive, decrease time to revenue and help expand the SAFIO Solutions business.

The Challenge

Because their clients operate using a variety of apps, channels and ERP systems, integrating into those systems had different requirements and was often a major challenge. The integration options were limited, time intensive and sometimes required manual processes.

> " Over the years I've worked with a number of different data integration platforms of different sorts and sizes. But what I've seen with Celigo is a cut above those other products, both from a product offering, but also in terms of positioning for technology needs and future growth. I look at the other platforms and they all feel like they are 10 years old or more. We're solving tomorrow's problems so we've been pretty excited. "
>
> — David Zey
> Chief Technology Officer
> at SAFIO Solutions

SAFIO Solutions
Sales Analysis – Forecasting – Inventory Optimization

Web Site
www.safiosolutions.com

Founder Audrey Walby was keen to fix this with a solution that could easily connect their product to their customers' tech stack. "We have clients who use Sage, SyteLine, Quickbooks, NetSuite, etc." explains Walby. "Their forecasting system is not as robust as what they need, and they like what we have. Connecting to SyteLine is going to be different than connecting Sage, and it's going to be different if they have Shopify, Amazon, and 3PLs. We knew to move forward we needed a really good connection point."

With their current vendor not delivering the results they were hoping for, Walby discovered Celigo while researching for alternatives. Her choice was further validated when David Zey, SAFIO Solutions' Chief Technology Officer, came onboard and confirmed that Celigo was a viable replacement.

The Solution

When choosing a solution, Zey considered several key elements: that it integrated well, had good support, was cost effective, and most importantly, solved tomorrow's problems. "Celigo just worked better for us because there are a number of different types of data we have to bring together for a complete picture." Zey explained.

In addition, the licensing model was a critical factor, and what the ongoing cost would be as SAFIO Solutions carried out integrations for clients. "One of the things I was very mindful of was, how do we scale in a way that fits our pricing model and start with what's the solution that fits that pricing?" Zey said. Celigo's pricing model based on actual integration points, and not on usage or bandwidth by their client was a major draw, as they would have no limitation on flows.

Once the team learned how to use Celigo, they were able to pick up momentum and speed on implementations, running multiple projects with fewer resources at the same time. Zey was encouraged by how flexible the solution was, which made it easier to think through different approaches to solve their customer's needs. "I realized that as the data comes into the system, if there are failures, Celigo retains the original data." said Zey. As the data can be reprocessed, it enabled Zey to move out of an "archive" mindset of managing data via a file-folder system. "If I need to pull the data now, I can. I can still save it as part of the transfer if I want, but I don't actually need to, and that general workflow is operationally cleaner."

The Bottom Line

SAFIO Solutions gained confidence in Celigo's platform when they found that there was a good degree of usability and were able to switch some customers on the old solution in about a week. They are also working on newer connectors, such as Amazon, QuickBooks, Shopify Plus, Trunk, Bench and more.

Having a viable integration solution has given SAFIO Solutions confidence in the sales cycle, now that it means they can win more deals and decrease the time to revenue. According to Walby, "We've seen a double or triple-time improvement on our ability to implement the integration, as well as support when issues or changes come." The ability to get their product set up and running very quickly has led to happier customers, despite using fewer resources.

Additionally, SAFIO Solutions has been able to reallocate headcount previously working on integrations and manual processes into other more strategic and meaningful activities. Prior to Celigo, they had a lot more developer footprint focused on integrations, but now they have someone who understands data to be focused on integration, which provides a lot more value to their customers. And many processes that were previously manual are now fully automated.

Finally, being proactive about fixing their challenges with integration has allowed SAFIO Solutions to do a little forecasting of their own — with the improvements enabled by Celigo, Zey says that it would now be easy to figure out the cost from the path they were headed. "As we push in further and do automations around APIs and all these, the Celigo product is going to stay ahead of us in terms of our demand and need. Celigo will give us a whole lot of value in terms of being flexible and responsive to our customers."

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> We've seen a double or triple-time improvement on our ability to implement the integration, as well as support when issues or changes come. Once we got our first implementation using Celigo, it immediately helped us solve some other business problems.
>
> — Audrey Walby
>   Founder/President
>   at SAFIO Solutions
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