

Golden Star Technology **CASE STUDY**



Company: Golden Star Technology
Year Founded: 1984
Website: www.gstes.com

Challenge: A nationwide IT solutions provider, Golden Star Technology (GST), struggled with inefficient and inaccurate manual workflows that slowed down their order fulfillment process. Their quoting tool didn't do everything they needed it to, and wasn't effectively integrated with their ERP software, which resulted in limitations to the company's visibility, bogged down their processes, and created customization issues.

Solution: Native integration and robust functionality came together with ConnectWise Sell and NetSuite to streamline their quote-to-cash process.

Results: With the combination of ConnectWise Sell and NetSuite, GST has revitalized their ordering system, improved forecasting, and enabled custom proposals while slashing processing times.

How a Nationwide VAR Transformed Their Ordering Process and Slashed Processing Times

Over the last 20 years, Golden Star Technologies (GST) has rapidly grown from a local computer sales shop to a nationwide value-added reseller, supplying more than 2,000 customers with custom technology solutions and professional services. With so much growth, the company needed to find a way to bring together their data center and hardware/software product sales, implementation services, and the audio visual and managed services arms of the business into a cohesive whole.

Jeffrey Smith, Senior Vice President of Operations and Strategy, was ready to take on the challenge of helping the company continue to grow while streamlining workflows, integrating solutions, and increase efficiencies across all areas of the business.

How did they do it? By continuously refining their channels of distribution, maintaining the quality of their core offerings, and evolving their processes and tools to do more. They found that in the highly competitive IT industry, process advancements can deliver game-changing results.

Are Our Systems Holding Us Back?

GST's recipe for IT success includes a keen focus on efficiency. When they noticed impediments in their quote and ordering process, they realized it was time to take a closer look at their existing quoting tool. Although it could pass some data to their ERP solution, it wasn't natively integrated which limited its usefulness.

There was no governance over data input, so the system was messy with few error controls. It was also an on-premise solution so when the server went down, everything went down. These limitations resulted in a lengthy ordering process which extended the sales cycle and impaired customer service. It was time to make a change.

GST selected NetSuite® to replace their ERP solution, but recognized that its quoting functionality was limited. To completely transform the company's ordering process, they began a search for a cloud-based quoting tool that was scalable, natively integrated with NetSuite, and equipped with robust functionality. ConnectWise Sell™—the NetSuite 2017 SuiteApp of the Year—was an easy choice.

Keep It Simple and Let the Data Flow

GST's ordering process was transformed as they embraced the functionality of their new tool set. They put the tight integration between ConnectWise Sell and NetSuite to good use with a single sign-on for both tools – the quote button in NetSuite automatically launches ConnectWise Sell and logs the user in.

Data flows easily between opportunities created in NetSuite and ConnectWise Sell for quote creation. Once published, the information flows back to NetSuite creating a single source for account information. Native data flow eliminated the need for dual reporting engines and the manual process of combining reports.

ConnectWise's quote and proposal automation solution

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Experience taught GST that their new system had to be user-friendly and keep them organized and efficient. To keep the process simple, ConnectWise Sell enables easy catalogue management through native connectivity with distributors. Even better, GST can quote items that don't yet exist inside of NetSuite—ConnectWise Sell can create these items in NetSuite, prepopulated in a standardized format.

In addition, ConnectWise Sell makes standardization a breeze. Jeff created a set of approved templates—housed in a centralized database—so his reps can follow an easy, repeatable quoting process. This saves time, removes redundancies, and improves the customer experience.

“The data flow between NetSuite and ConnectWise Sell is just so solid. We can't break it; we've tried!”

— Jeffrey Smith,
Senior Vice President of Operations
and Strategy, Golden Star Technology

Custom SOWs? No Problem!

Custom statements of work (SOW) are commonly created when GST sells services. Unlike product quotes, where parts are listed in preexisting catalogs, quotes for services require complicated costing formulas. Before ConnectWise Sell, this process was managed manually by solutions architects in spreadsheets and word documents outside of the quoting system. The process was not only slow, but messy. Now, solutions architects can log into ConnectWise Sell, view notes, and create a statement of work using integrated spreadsheet capabilities, all without leaving the system. When complete, the sales representative is automatically alerted that the SOW is ready. In addition to time savings, this consolidation also delivers a single source for account information that enables visibility and easy reference for anyone engaging with the account.

Forecasting without a Crystal Ball

Before ConnectWise Sell, it was impossible for GST to capture sales pipeline for jobs that were in the distant future without specific equipment details. This made internal forecasting inaccurate and communication with distributors incomplete. With ConnectWise Sell, GST created a custom catalog of “pipeline parts.” When an opportunity is created using these parts, it is shared with the appropriate manufacturers such as Dell, HP, and Intel. Instead of forecasting based on proposals alone, GST can now include future deals in their revenue projections and share them with original equipment manufacturers (OEMs) for better results.