WorkRails × Namely

Case Study:

Scaling Revenue at Namely

After successfully using WorkRails to help Customer Success and Professional Services accelerate bookings, Namely expanded its offering to include client facing solutions that improved the customer engagement model and scaled revenue

Who is Namely

Namely is an award winning leader in the human resources software space, whose mission is to help mid-sized companies build a better workplace. In conjunction with their software, they also offer clients Professional Services to help implement new system functionality, offer industry best practices across their various modules, and drive additional value and adoption from the platform.

What was Their Problem?

Professional Service offerings at Namely prior to WorkRails were quoted on an ad-hoc basis by their Customer Success function, and often required several back and forth communication chains with clients in order to gather all of the necessary project details, accurately quote the customer, and close the deal. This process on average took two weeks from start to finish, and required participation from their Customer Success, Deal Desk, Professional Services, Legal, and Finance functions. Once a deal was closed, it took on average 3 business days to book the new revenue and create the correct downstream PSA projects needed in their implementation of WorkFront.

How did we fix it?

Namely engaged with WorkRails to solve these pain points, and the resulting implementation proved to be a highly successful solution that served as the connective glue between their various order-to-cash systems, including Salesforce CPQ, Zuora, NetSuite, and WorkFront PSA. The WorkRails solution augmented and enhanced these systems in ways that a conventional ETL solution simply cannot, and radically improved metrics across the board which have led to significant found services revenue and customer satisfaction.

This implementation decreased hassles associated with the services sales process and accelerated bookings, and resulted in such a streamlined process that Namely decided to create a "self-serve" client facing solution as well. After transforming how they sell services, the forward thinking Professional Services team saw an opportunity to take this newly digitized process and apply it to a solution that would create a far better experience for their clients as well. There were some challenges to overcome:

- Clients had no central access point
- Services can get complex and clients have limited understanding of the offerings
- There was no way to automate the process by which information is collected from clients
- Each offering required unique workflow, pricing logic that leveraged Salesforce.com data, and supporting content
- Notifications of client activity needed to be generated and easily acted on
- An authorization workflow was necessary in order for clients to self-purchase services

Namely created a "Services Portal" integrated into their new Salesforce Communities offering, complete with tools to allow for easy discovery of the services needed. Once discovered, a Client could then add one or multiple outcome oriented solutions to a shopping cart and purchase services on the spot. This "consumerization" of services was made possible, despite the many differences between each offering, through the suite of WorkRail's configuration tools. These tools allow for custom workflows, unique services content, and automation processes. Additionally, WorkRails provided approval workflows, an actionable notification process, and integration with the existing tools used by the services team. Most importantly, all of this functionality was hidden behind a simple, easy to use interface for Namely's clients!

> "Clients now have a better experience purchasing our services, and are also getting more value from Namely as a result. Our internal teams are ecstatic with the process efficiencies we've gained, in addition to how much the solution scaled our services revenue."
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> Tom Kline, Head of Business Systems, Namely
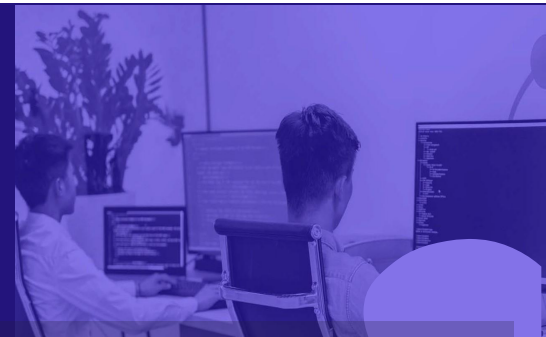
Results?

New Revenue Stream
Accelerating revenue by over 100% as compared to prior fiscal periods

14 Days to minutes
Services Quote-to-order

3 Days to Seconds
Order-to-Booking

5 to 0
# of Departments needed to Quote Services

WorkRails