xappex
Case Study

For the past decade, Infinite Analytics has focused on leveraging Salesforce technology to support a client base of premium retirement homes, assisted living companies, and related companies. Typical client needs include improving sales effectiveness, marketing analytics, business intelligence and data quality projects.

To serve its clients, Infinite Analytics uses a combination of software, including Salesforce and Excel. However, the traditional ways of working with data and these tools have become inefficient and time-consuming.

The High Cost of Manual Data

Infinite Analytics sought an Excel automation solution for Salesforce after seeing the high costs of manual data work.

"I occasionally observe employees at my clients complete their work and use data to understand their needs. I constantly saw people managing data manually, copying and pasting data between different sources. When you see people doing the same work repeatedly, it got me thinking: there must be a way to automate this work," said Larry Wieskopf, President of Infinite Analytics.

The cost of manually working with data, reporting, and analytics affects organizations in several ways:

Productivity cost

Infinite Analytics' clients faced a productivity cost – gathering and organizing data could sometimes take hours, days, or even longer. The time-consuming nature of data analytics effectively acted as a disincentive to request data-based insights.

"Unfortunately, a lot of people are so used to their work routine with data that they don't even notice the inefficiencies," said Wieskopf.

Data quality problems

"The standard workflow involved extracting data from multiple systems and apps. The manual work involved meant many steps to assemble a report. Each of these steps increased the chance of data errors," Wieskopf commented.

Detecting and preventing errors introduced by these manual processes cost additional staff effort. As a result, management had to wait longer to receive information. Past data quality errors also raised doubts about whether the reports were reliable.
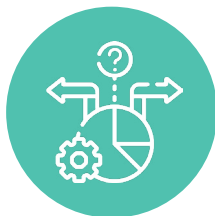
Limited data-based decision making

The level of manual effort required to produce reports for sales, marketing, and operations held managers back. Sales managers had limited data to coach their sales representatives effectively. That means improving sales productivity has become very difficult.

Discovering XL-Connector

Infinite Analytics started using XL-Connector in 2017 after exploring solutions.

"When I sought a solution to integrate Excel into Salesforce a few years ago, XL-Connector was the first compelling solution I found," Wieskopf explained.

The Return on Investment of XL-Connector

Implementing XL-Connector at Infinite Analytics – and the company's client base – delivered significant benefits for Wieskopf and his clients. Infinite has implemented XL-Connector for over 30 Salesforce instances.

The implementation process was fast and easy. *"We were up and running with XL-Connector in a few days. The Xappex team provided a great onboarding experience,"* said Wieskopf.

Improved Decision Making

The ability to quickly run reports opened up exciting new possibilities for Infinite Analytics.

"My clients can now get answers to ad hoc questions easily. For example, we recently found a great sales coaching opportunity. We found that certain actions – like viewing a property's floor plan–are a great signal of a warm lead. We see increased sales results by quickly identifying those warm leads and sending them to sales representatives."

Saved Hours On Reporting Every Week

XL-Connector has delivered substantial time savings for users creating reports.

"Before using XL-Connector, our clients had a labor-intensive process to complete reports. Typically, a marketing assistant would come in early on Friday and spend half the day or more on building a sales or marketing report," Wieskopf explained.

That's all changed by adding an XL-Connector to client workflows.

"Instead of taking half a day to create a sales and marketing report, it usually takes about a minute or two. In larger organizations, the software might take a few minutes. At most, you'll have your detailed reports done when it takes to get a cup of coffee," Wieskopf explained.

Reliable Data Conversions 5 Times Faster

Data conversions used to be a painful, time-consuming experience for Infinite Analytics.

"We used to book a week for data conversions. Now we can do a data conversion in a day. We typically collect data from at least 2-3 systems. This usually includes prospect lists, transaction files, and marketing data. The client typically provides the source data in Excel format, and then we use Xl Connector to manage the files," Wieskopf said.

Try XL-Connector For Free Today

Find out what XL-Connector can do for you today. Try XL-Connector for free for 30 days to see if it is suitable for your company. What if you could save 4 hours or more per week on Excel tasks? That's more than possible with XL-Connector.

How Much Time Can You Save In Salesforce With Xappex?
- Current time spent in Salesforce: 10 hours per week managing data, You Could Save 8 Hours
- Current time spent in Salesforce: 20 hours per week managing data, You Could Save 16 hours
- Current time spent in Salesforce: 30 hours per week managing data, You Could Save 24 hours