



## Utilizing NetSuite Customer Relationship Management (CRM)

*“Explore Consulting has made it possible for X2nSat to achieve the next level of success through the implementation of NetSuite’s CRM and core accounting solutions, meaning we are able to better serve our potential and current customers around the globe.”*

*- Garrett C. Hill, CEO, X2nSat*

**Background:** X2nSat is one of the most veteran VSAT providers in North America. Founded more than 15 years ago with a mission to provide highly reliable, wireless network and communication solutions to a wide variety of industries, X2nSat is proud to provide the robust services of a large telecom with the personalized customer care of a specialty organization. When utilizing any of X2nSat’s services – from an extensive catalog of enterprise solutions to managed services and engineering consultation – organizations are getting much more than a passive third-party contractor. X2nSat operates as the satellite communications arm of organizations it serves, committed to superior service and to extending customers’ reach anywhere in the world.

**Issue:** X2nSat was faced with the challenge of managing its growing number of customers and sales opportunities due to the limited capacity of its current customer relationship management (CRM) system, ConnectWise. ConnectWise housed all of X2nSat’s customer information, but it did not provide

### Customer Status List

INTERNAL ID	CUSTOMER STATUS	STAGE
7	First Appointment	Lead
17	Prospect Disengaged	Lead
18	Qualified	Lead
6	Unqualified	Lead
9	Advanced Information Gathering	Prospect
11	In Negotiation	Prospect
8	Initial Information Gathering	Prospect
19	Lost	Prospect
10	Proposal	Prospect
12	Verbal Commitment	Prospect
16	Former	Customer
13	Won	Customer

opportunity management, pipeline forecasting, or sales reporting capabilities. The ConnectWise system was unable to keep up with X2nSat’s complex needs. The company needed a CRM tool that could scale at the same pace of its growing business.

**Solution:** X2nSat’s leadership asked Explore Consulting to design a solution that would surpass the limitations of the current system. X2nSat was able to utilize many of NetSuite’s native CRM functionalities to meet its needs. Explore’s team of consultants utilized NetSuite’s opportunity management to provide sales forecasting that was previously unavailable to X2nSat. Sales reps can now create opportunities and proposals within NetSuite that flow into pipeline reporting. X2nSat is also now able to create and manage sales

### NetSuite Implementation at a Glance

#### Industry

Satellite Communications, Business Continuity

#### Number of Employees

Approximately 50

#### Application Replaced

ConnectWise

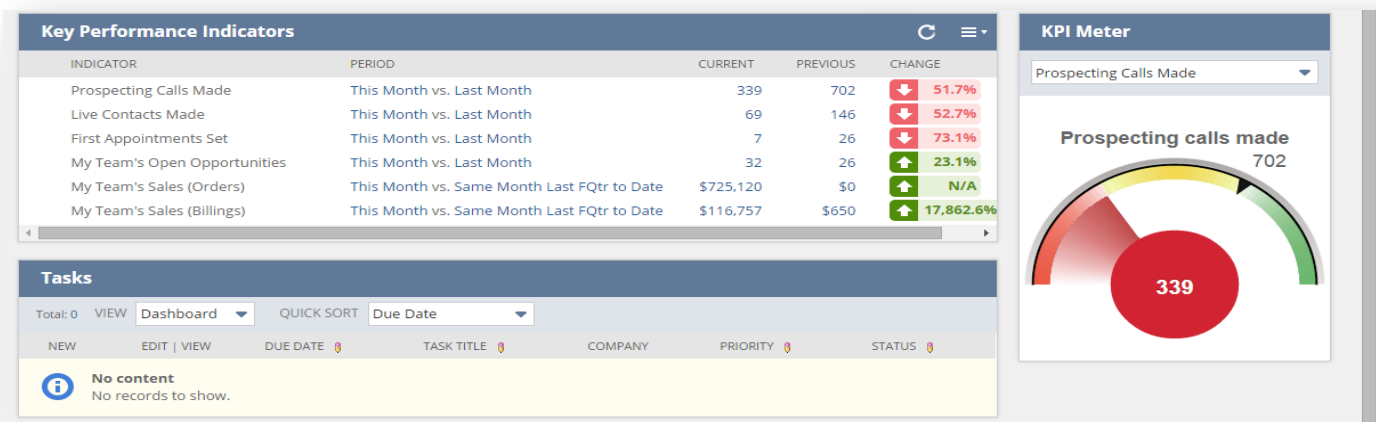
#### Modules Implemented

Core Accounting, NetSuite CRM

quotas within NetSuite and view both forecasted and actual sales in the same report. Explore also created dashboard views of key performance indicators (KPIs) for X2nSat so they can easily view actual sales to quota and forecasted sales to quota. In addition to pipeline metrics, Explore also created dashboard KPIs regarding customer contact. From a customized NetSuite dashboard, a sales manager is able to view the number of prospecting calls made (this month vs. last), live contacts made (meaning they reached an actual person vs. voicemail), and how many first appointments have been set. Within NetSuite, sales reps now can track all forms of contact made with a customer. Sales reps are able to log phone calls, open tasks, and create calendar events that can be shared with managers. Explore also created X2nSat customized customer statuses, so the status of each

prospect or customer can be tracked with more granularity. The sales staff is now able to easily see which stage of the sales cycle each client is in just by looking at the status feature.

**Results:** With the implementation of NetSuite's CRM, X2nSat has greatly improved visibility into its pipeline and opportunities. The company is now able to predict sales outcomes based on current open opportunities and proposals, as well as easily monitor tracking against sales quotas. X2nSat has successfully utilized NetSuite's CRM functionality to track all engagements with customers. All customer contact is now well-documented, meaning reporting and metrics data for each customer is at the sales team's fingertips. For more information about X2nSat, visit [www.X2nSat.com](http://www.X2nSat.com).



## About Explore Consulting

Based in Bellevue, Washington, Explore Consulting was founded in 2001 and is a professional services company dedicated to providing innovative and cost-effective solutions for their customers' database and IT systems needs. Having specialized in cloud-based solutions for more than 14 years, Explore Consulting is the largest and most experienced NetSuite reseller and solution provider in the Northwestern United States.

Explore Consulting is well-known as a leader in NetSuite implementation, customization, integration and eCommerce, and has also been a 9-time NetSuite Star Performer, won 22 NetSuite awards, and was recently named as 2014 NetSuite Partner of the Year, Americas. For more information, visit [www.exploreconsulting.com](http://www.exploreconsulting.com).