

Persistent Systems, LLC

Defense and Commercial Market Pioneer

Persistent Systems delivers flexible and reliable mobile networking capabilities based on its flagship state-of-the-art Wave Relay® MANET technology. The company serves the defense, commercial, and public safety markets by offering a versatile communication network to mobile users without a fixed infrastructure. The unique applications of Persistent's cutting edge communication technology make the company a sought-after partner by entities such as the U.S. Government, emergency services, and third-party military contractors.

Founded: 2007

Industry: RF Networking

HQ: New York, NY

Solutions: Salesforce & OneOffice Duet360™ Enterprise for Infor CSI

Partners Since: 2019

Forecast Accuracy Key Requirement

Kayla Lively, Persistent's Sales Operations Team Leader, manages software implementation projects for the company's sales division. Persistent was using a financial solution for account and business management but lacked integration with their Salesforce CRM system. Replacing that solution with a more robust ERP system Infor CSI, was step one. The next strategic move was to source a solution capable of syncing business data between Infor CSI and Salesforce.

All the line-item detail and the collecting of information needed to be summarized accurately and kept up to date in the forecast. "A key requirement was the forecast which was from two different systems and a nightmare to prepare. A more reliable way was a necessity to run the business," stated Lively.

Product quotes included warranty information, service support hours, and other services offered to the customer. These line-item details were added manually in each system without the ability to sync data. "We had to make individual fields per product item sold which was hard to manage and maintain. Data accuracy was a concern." The multiple step process was manual, slow to compile and then gain the appropriate approvals. Additional time was needed to update inventory levels. The solution was not scalable to meet the growing business needs.

Eliminating Manual Data Input with OneOffice Duet360

"We needed a strong solution to drive our business. Copley, our Infor consulting partner, recommended we learn more about the capabilities of OneOffice Duet360 from Endowance Solutions."

The flexibility of the Duet360 business integration allowed Persistent the advantage of a bidirectional data flow between the two systems.

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*Kayla Lively,
Sales Operations Team Leader*

“Being able to support our business process by changing the order anchor point from the estimate number to an opportunity name gave us a bidirectional flow of opportunities which are easily updated.” Beginning with a prospecting opportunity in Salesforce, synchronization maintains both systems correctly with any updates or changes needed.

Bringing line-item detail into Salesforce was a major benefit of Persistent’s partnership with Endowance. “The Duet360 integration with Salesforce was an important sales and forecasting benefit, we’re able to bring line-item detail into Salesforce. This alone has made a significant improvement to our bottom line,” says Lively.

Persistent’s sales team utilizes Duet360 to automate sales order revenue recognition. “We used to process our orders and then manually close them out in Salesforce causing revenue numbers to be inaccurate,” says Lively. “The integration streamlined this function by automatically closing opportunities created in Salesforce, saving time and resources. Not only is the accuracy of our financials significantly improved, but the entire process takes 50% less time than before, saving both time and cost.”

“We made the right decision selecting Duet360 for our integration project. It just works. It’s been a positive experience, and the project launch was a great success.

Now that phase one is complete, we are planning phase two working with Endowance Solutions to drive more benefit for the company.”

*Kayla Lively,
Sales Operations Team Leader*

Maximizing Productivity and Forecasting the Future of the Security Industry

Lively is looking forward to harnessing the full capability of the OneOffice Duet360 integration. “The Salesforce forecasting capability will be a nice time savings.” With the Persistent sales team working remotely, communicating customer profile and business information throughout the organization is critical to all divisions. Finalizing quotes and closing business is much more efficient.

Persistent serves the defense and emergency markets. Sales cycles can be prolonged due to extensive compliance and security measures. Synchronizing systems assist to save time and maximize productivity through the sales process delivering a strategic selling advantage. “We made the right decision selecting Duet360 for our integration project. It just works. It’s been a positive experience, and the project launch was a great success. Now that phase one is complete, we are planning phase two working with Endowance Solutions to drive more benefit for the company,” Kayla concluded.