

ExtendSync Integration Saves Plum Laboratories up to 15 Hours Per Week While Working Directly from Outlook

Company

Plum Laboratories

Product

ExtendSync for Outlook

About

Plum Laboratories was founded in Tennessee after co-founder Lee Williams worked through 41 various prototypes to eventually create a portable communication solution for a local sheriff that could be used anywhere. Now Plum Labs is dedicated to the continual development and production of world-class, portable, high-speed connectivity devices like its flagship product, the Plum Case. Their solutions provide connectivity from virtually anywhere at the push of a button for mission-critical communication.

Background

In an organization that is dedicated to enabling critical communication, the Plum Labs IT team needed to find a way to make it easy and seamless for the organization's critical communications to get into NetSuite CRM. "We didn't have a way to attach email to records unless you were natively emailing out of NetSuite," said IT and NetSuite Administrator Chase Breland. "And most people don't like to email straight out of NetSuite, so emails weren't getting attached."

The Challenge

While Plum Labs was insistent that they needed emails properly synced to NetSuite CRM records, the sales team was not keen on consistently emailing everything through NetSuite in order to track. "Everyone wants to use their native email outbox," Chase recalled, "and that totally makes sense." So he began a search to find software that would make email syncing between the inbox and NetSuite easy and part of the natural process, without forcing the sales team to navigate away from Outlook.

The Solution

As soon as Chase saw the ExtendSync solution in a demo, he knew it was the right option for the team. Within a week of experiencing a demo, Plum Labs had ExtendSync up and running. "It's very straightforward to utilize ExtendSync," Chase said.



We wanted to find a software that made things easier. With ExtendSync, we can utilize Outlook and just attach emails right there. It saves us about 15 hours each week.



Chase Vreeland

Principal, IT and NetSuite Administrator
Plum Laboratories



PLUM · CASE
PLUM LABORATORIES, INC.

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plumcases.com

The sales team proved that: Using ExtendSync was as simple as logging in and clicking on an email. “We wanted something that was easy for the sales team to latch on to, because prior to that, we had no data retention through our emails,” Chase noted. “We thought if we could even get our data retention up to 50 percent, that would be a big win for us.”

As it turned out, ExtendSync was so easy to use that the sales team got on board 100 percent and has been habitually using it day in and day out since it was implemented. Autopilot features enable a “set it and forget it” process for specified email threads or addresses as required by context. The team takes advantage of ExtendSync’s ability to save attachments, as well. “A lot of the time when we’re saving files, it was email attachments that before, we’d have to download and then manually attach to the customer record in NetSuite,” Chase admitted. “Now we can save files with ExtendSync.”

ExtendSync ended up being so beneficial that now every member of the Plum Labs team—whether or not they’re in sales—also has an ExtendSync license. “Every single person that has a Plum-owned computer has a license for ExtendSync,” Chase said. “It’s not just for sales. On the production side, when we’re emailing vendors, we want to relate those back to open POs and other NetSuite records. ExtendSync is helpful across all areas of the business.”

The Bottom Line

What started as a search to help documentation processes for a sales team has turned into an organization-wide efficiency improvement. Data from ExtendSync helps leaders with performance metrics within the sales team and how outreach is looking. Automating the email attachment process is also saving a significant amount of time, which is especially important on a smaller team like Plum Labs has. “We’re saving close to 10 hours total each week,” Chase reported. “Add file attachments on top of email, that’s probably another hour per person. So you’re looking at close to 15 hours saved each week.”

“A salesperson’s job is to go out and sell the product the best they can. And if they’re worried about having to retrace their steps to go back and save an email in NetSuite, that impacts things,” Chase concluded. “We’ve used ExtendSync for five years now. It does what it’s supposed to do and works without fail.”



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About CloudExtend

CloudExtend empowers organizations to make faster, more insightful decisions by creating innovative, user-friendly applications that integrate workplace productivity tools with platforms they use every day.

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