


# Driving customer satisfaction through a single source of truth



“As we scaled and new teams were formed, it was important that we were all working from one source of truth.”

— Adam Hay, Senior Operations Director, Jellyfish

## **What will it take to thrive in any business climate?**

In the best of economic times, managing a services business brings a multitude of challenges. But when those times turn, and a persistent volatile environment with increasing global economic uncertainty, business challenges are magnified several-fold.

Amid such uncertainty, how can services businesses continue to survive and thrive? How can they demonstrate the resilience to innovate while delivering an exceptional customer experience? In a word, cohesion. Be sure that all facets of the business are unified and running at peak efficiency.

In a robust economy, process disconnects and business inefficiencies may be overlooked. During more uncertain times, however, there is no room for missed connections between siloed departments. But the fact is, many services organizations today still rely on data silos in disparate legacy systems to run their business.

The result is operational inefficiencies across the entire organization. See if you recognize any of these maladies:

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Sales, Services, Finance, and Customer Success teams operate in silos.

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Sales is unclear on what's available to deliver and can't provide accurate estimates to customers.

**3**

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Services must rely on limited information and can't manage resources appropriately for peak and slow periods.

**4**

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Customer Success faces planning and execution challenges, limited visibility to customer's initiatives and health which leads to missed opportunities.

**30% in annual revenue losses is caused by data silos.**

IDC Market Research

Any combination of the above ultimately leads to unhappy customers. And that's a prescription for failure in a challenging economy.

The remedy: connecting all facets of the organization, backed by a single source of truth that everyone can rely on.

### **A unified platform approach**

How can one best achieve a single source of truth? By adopting a unified platform approach. Services businesses looking to deliver excellence across the entire customer journey should seek a single backbone (that is, a master customer record) that connects all areas of the business— from sales to delivery to services to finance and customer success.

Once an organization builds a unified platform that provides a single source of truth to the business, a golden record, the benefits are rapidly apparent.

On the strategy side, you can improve predictability by getting a complete view of the business, across the entire organization: sales, services, projects, finance, and so on. That enables you to accelerate planning cycles, with core operational information and analytics coming from a single platform.

**Services  
Financials**

Streamline and automate cash flow management (and, in fact, your entire financial operation) to easily measure the financial health across your portfolio of customers. Also generate more accurate invoices, and reduce DSO, thanks to consistent records across the entire customer billing lifecycle.

**Project  
management**

Achieve superior visibility by using a master customer record to better manage resources, costs, activities and financials — and connect all aspects of a project to that record.

**Enterprise-wide  
collaboration**

End the sloppy or incomplete hand-offs from Sales to Service to Success teams. Accurate resource and project scoping enables your teams to kick off projects automatically from an opportunity, reduce risk and increase customer success.

**Customer care**

Provide a superior customer experience, based on a customer-centric approach and anchored on a single platform that consolidates all data related to customers, projects, resources and financials.

### **The key: Real-time analytics**

In all of the above, a unified platform ensures that everyone is on the same page and working from the same definitions/metrics, rather than operating from multiple, disconnected, disparate spreadsheets. And key to that platform is real-time analytics, because they provide services businesses with accurate, timely and actionable insights such as demand, utilization, backlog and capacity. The emphasis here is on real-time; after all, the end of the quarter is too late to discover issues that need to be addressed right away.

Analytics should be automated, either through AI or role-based dashboards. That's far superior to putting the burden on users, the operations team or IT. With automated analytics, team members can easily identify customer opportunities, project trends, insights into receivables and margin health across the organization — all without departmental bias, since everyone is operating from the same set of numbers.

### **Common goal, common data**

Your business can't afford to operate in silos. In uncertain economic times, every stage of the customer journey must be seamless, and every organizational function needs to work together towards a common goal. That requires working from a common, shared set of data. You need a unified technology platform that provides a single source of truth enterprise wide — demonstrating the resilience to innovate while delivering an exceptional customer experience.

# It's time to build a connected customer journey with a single source of truth.

What are you  
waiting for?

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