



# Nintex streamlines team onboarding, and system migration to Salesforce.

When Nintex acquired Promapp, sales teams used the process mapping platform to seamlessly migrate customer records and onboard new team members.

**Organization**

Nintex

**Website**

[www.nintex.com](http://www.nintex.com)

**Industry**

Software

**Country**

HQ in U.S., major offices in Australia, Malaysia, New Zealand and UK.

**About**

Nintex's mission is to improve the way people work through process management and automation. The company employs more than 500 people around the world who are committed to the success of Nintex customers and partners.

**Business Benefits**

Process inefficiency cut by 75%

Savings in excess of \$85,000 per month

Salesforce migration complete within tight deadlines

Clear direction based on visual process maps

Increased collaboration, engagement and process quality

Preparation for automation and RPA

# Smooth migration to new CRM.

Following the acquisition of process management specialist Promapp, newly-formed Nintex teams needed a method to quickly and efficiently combine the customer records of both organizations.

In addition, both sales teams relied on existing processes which would need to change in order to ensure maximum efficiency and maintain first-rate customer service.

“We set ourselves a deadline of two weeks to have the new CRM system ready for business,” says Nintex Regional Sales Director for APAC, Sarah Mainprize. “This meant we only had a small window in which to migrate records and have everything operational on Salesforce, our CRM platform of choice.”

To begin the process, the combined sales team undertook two days of intensive Salesforce training. During these sessions, the team was introduced to a series of newly-created, high-level processes in Nintex Promapp® which outlined how to manage future prospects and sales. By having a visual of these processes, the sales team had clear direction on how a sale should be managed, both within the Salesforce environment and as members of the wider Nintex sales team.

“It was a true team effort where individual input was encouraged and then captured,” says Sarah. “By utilizing Nintex Promapp’s feedback capability, we ensured that there was a record of every improvement suggestion, and that the relevant people were aware of them.”

Christian Lucarelli, Nintex VP of Sales in APAC says the overarching goal of the team was to complete the migration without having any detrimental impact on business operations. The aim was to avoid delays that would hinder the team’s ability to deliver quotes and communicate effectively with customers throughout the sales cycle.

“I estimate the migration cost us two days during the first few weeks of using Salesforce,” says Troy Sweeney, Nintex account executive and Lean Six Sigma Black Belt. “This is quite an achievement, made possible because our team quickly got up to speed on the new CRM system thanks to the practical, easy-to-follow process maps available in Nintex Promapp.”

# Back to business-as-usual.

Key processes were redesigned and redeployed without the need for a large, dedicated development team. Once the new processes were captured and operational, the sales team quickly got back to business-as-usual activity, and the positive impact of the changes soon became apparent.

“Based on the limited amount of disruption caused by the change, and the rapid onboarding of the Promapp sales team, we’ve calculated that our level of process inefficiency was cut by 75%. That saves us more than \$85,000 per month,” says Troy.

The sales team continues to use Nintex Promapp to capture ongoing improvement suggestions, which are implemented on a regular basis. “We’re always reminding the team that this is a work in progress, and we all want to make it as efficient as possible,” says Sarah. “Nintex Promapp is great for driving that continuous improvement cycle.”

# Delivering value - now and in the future

The success of the Salesforce migration means the sales team can personally endorse the power of Nintex Promapp's ability to drive process excellence and build a culture of ongoing improvement.

"We've been successful with our technology and it's been amazing to see how powerful Nintex Promapp has been for our own team," says Christian. "When we share this experience with our customers and prospects, it really resonates with them."

With the Salesforce migration now complete, attention is turning to how Nintex Promapp can deliver value in other areas.

"There will always be an opportunity and a need for new processes and process refinement. We're currently at 80 percent process quality and working on the remaining 20 percent. It's a process of continuous improvement and it's ingrained in our culture," says Sarah.

Christian says a particular area of focus is process automation. Attention is being given to how this can be put to work across the organization, to free teams up to focus on more satisfying tasks.

"We're having conversations and identifying points where workflow automation and robotic process automation make sense within our own sales processes. It's happening, and the future is going to be very exciting for us," Christian concludes.



## About Nintex

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting [www.nintex.com](http://www.nintex.com) and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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