

# Carbonite: Delivering Integrated Sales and Marketing Analytics



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- Vice President of Customer Support, Robert Frost, Carbonite

Carbonite is a leading provider of cloud data protection solutions that fuel business continuity for small and midsize businesses. The company supports more than 1.5 million individuals and small businesses worldwide, ensuring their important data is protected, available and useful.

Sales and Marketing Operations teams at Carbonite require analytics from the company's Salesforce.com platform to accelerate their decision making surrounding everything from lead management to sales strategies. However, the company's reliance on a cloud platform system to manage integration between their Microsoft SQL Server data warehouse and Salesforce.com, undermined the speed and timeliness of decision making.

Justin Donlon, a business intelligence solutions architect at Carbonite, explains, "Sales and Marketing struggled to get their hands on timely, trusted data. This was because our previous cloud solution was unpredictable, resulting in an excessive number of integration errors which were difficult to understand and resolve. These

errors diminished the credibility of the data. Meanwhile, we were also struggling with an unnecessarily complex Microsoft SQL Server Integration Services (SSIS) staging process to prepare the data. It was time to find a more efficient solution."

As a rapidly growing business, Carbonite had requirements to triple the amount of data in Salesforce.com—leads, contacts and opportunities and custom objects. "The previous solution could never have coped with this volume of data," says Donlon. "We replaced it with Informatica Cloud Integration and this process became very simple."

"Informatica Cloud is a revelation compared with the tool Carbonite used to rely on," says Donlon. "It enables our business and IT users—in fact almost anyone—to connect data from any source and deliver in-depth market and client insights. It is feature rich, easy to use and scalable. We are now able to deliver sales and marketing intelligence at the speed of the business. It's straightforward and reliable."

## CARBONITE

### Overview:

Leading business continuity solutions provider uses Informatica Cloud to share relevant and trustworthy Salesforce.com information in real-time.

### Business Needs:

- Accelerate Sales, Marketing and Services decision making
- Support rapid business growth with access to trusted information at every touch
- Deliver exceptional, responsive customer support during every engagement

### Data Challenges:

- Manage 3-fold growth in Salesforce data—legacy cloud integration unable to cope; too many processing errors
- Integration of data from legacy platforms onto the Force.com platform was slow, preventing the business from having a single view
- Manual data entry was slowing client interactions and impacting Salesforce.com adoption
- Sales and Marketing Operations did not have access to the data needed
- Disconnected business unit data silos were inhibiting the potential of Salesforce.com

### Solution:

- Informatica Cloud enables business and IT users to connect data from any source and achieve in-depth customer insights
- Informatica Cloud Application Integration automates workflows for improved client experiences, accelerated Salesforce.com adoption and a complete campaign history

## Powering customer service with workflow automation

This early business intelligence success was soon compounded by rapid benefits with Informatica Cloud within Carbonite's Customer Support operation. This business unit uses the Salesforce.com Service Cloud to manage support cases arising from their subscriber and trial user base. However, to deliver responsive and reliable support, the 220 support agents also needed to access additional customer subscription data residing outside of Service Cloud, in Carbonite's master subscription database. This data (captured and created during the trial and subscription processes) included the customer's ID, billing data, the software version they used and the volume of customer data under protection.

Prior to using Informatica Cloud Application Integration, when a customer contacted the Carbonite support team, the agent found this historical case data in the Carbonite CRM system via a search based on the customer's email address. This was a time-consuming process. The agent then manually copied the identifying fields (between two and nine fields, depending on the customer situation) from that system and pasted these into Service Cloud. The process was necessary to support both sales and case management reporting, but demanded a significant amount of manual intervention, resources and

time. The manual copy/paste process was also vulnerable to human error.

Informatica Cloud Application Integration now automates the movement of subscriber information in real-time from Carbonite's CRM system to the support case created in the Service Cloud. Not a single line of code needs to be written. Informatica Cloud Application Integration automatically finds all cases associated with an email address and displays those cases to the support agent within Salesforce.com in a real-time process guide. These guides automate workflow processes. Each guide supports a business process, and a new guide can be created at any time by non-technical resources. The agent simply selects the relevant record and those nine fields are automatically saved into the case.

This process automation solution is accelerating the workflow for Carbonite's 220 service agents, enhancing the Carbonite client experience and improving business reporting.

Vice President of Customer Support, Robert Frost is thrilled about this automation. "This new workflow shaves at least 10 - 20 seconds off the individual case creation time. Our 220 agents are creating hundreds of cases every day, so the savings in time, money and headcount is dramatic. We have also eliminated data quality errors which used to occur during the copy/paste stage. Best of all, this Informatica solution has helped us invest in current employees and training/resources rather than headcount to support manual processes."

In addition to the time and cost savings, this improved workflow accelerates the adoption of Service Cloud. Until now, the support team's adoption and attitude towards using Service Cloud had suffered owing to a lack of visibility into the Carbonite CRM system. Informatica Cloud Application Integration helped reduce the manual effort required to open new cases, and quickly led to widespread Service Cloud adoption among the support team.

VP of Business Analytics, Matthew DiAntonio comments, "Integrating data on the Force.com platform delivers the opportunity for comprehensive analytics. Adoption of Service Cloud ensures that we can rely on these analytics."

## Unleashing marketing potential

Another successful use case for Informatica Cloud Application Integration has been the integration of marketing data into Salesforce.com. Carbonite sends millions of outbound emails every year. It would be prohibitive to integrate every one of these emails into Salesforce.com, so Carbonite relies on the process automation capabilities of Informatica Cloud Application Integration to add a separate tab to the 'Contacts' page in Salesforce.com. It's a quick, easy and cost-effective means of ensuring the Sales and Support teams have a 360-degree view of the campaign history surrounding each customer.

## Looking ahead

In addition, Carbonite's business applications team, armed with Informatica Cloud, will seek to further integrate other Salesforce.com silos across the enterprise, all with the aim of quickly fulfilling business requirements for data. Donlon now operates between IT and the business, taking

responsibility for all things Salesforce.com, including integration. He explains, "Our Salesforce.com footprint is expanding rapidly, and I'm listening carefully to the needs of all of the users, whichever business unit they represent. Informatica Cloud enables us to stay one step ahead of the demand for data sharing, and steadily raise the maturity of applications across the business."

### Benefits:

- Delivered sales, marketing and services data rapidly and with ease
- Reduced individual support case creation time by 20 seconds using real-time integration (hundreds of cases created each day), saving time, money and headcount
- Accelerated Force.com adoption across the enterprise
- Automated service agent workflow and enhanced the client experience
- Increased quality and reliability of service case records
- Provided sales and support teams with 360-degree view of customer marketing campaign history
- Empowered company to deploy ongoing automated workflow guides in a self-sufficient manner

### Inside the Solution:

- Informatica Cloud
- Informatica Global Customer Support
- Informatica Email Verification



Digital transformation is changing our world. As the leader in enterprise cloud data management, we're prepared to help you intelligently lead the way. To provide you with the foresight to become more agile, realize new growth opportunities or even invent new things. We invite you to explore all that Informatica has to offer—and unleash the power of data to drive your next intelligent disruption. Not just once, but again and again.

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