

Success Story

Brightly achieves 360-degree view of entire business and 97% customer satisfaction with Sage Intacct

Brightly

“We make a change in Salesforce and the data is instantly updated in Intacct, and vice versa. We now have a centralized repository for all our front-office and back-office data. Intacct and Salesforce serve as the hub of our business, allowing us to better serve the national educational market.”

Kent Hudson

CEO and Co-Founder, Brightly



Company overview

Brightly was formerly known as Dude Solutions and was rebranded in 2022. Brightly helps to maintain, improve and optimize the day-to-day operation of billions of square feet of facilities across North America. Leveraging a robust pool of data and one of the best support organizations in the business, the company helps its clients gain valuable insight by establishing and reviewing Key Performance Indicators (KPIs), comparing their performance with that of their peers and driving continuous improvement.

Results with Sage Intacct

- Eliminated duplicate data entry with integrated front & back offices.
- Gained a 360-degree view of entire business.
- Achieved 97% customer satisfaction rates by providing support reps with a complete customer history.

Sage

Company
Brightly

Location
New Jersey, US

Industry
Technology & Software

Sage Products
Sage Intacct

Brightly



Integrating its financial management applications with Salesforce helped Brightly achieve an impressive 97 percent customer satisfaction rating.

Grappling with disconnected applications

Brightly is a provider of online tools that help organizations manage their operations across industries like education, government, healthcare, senior living, and manufacturing. The company previously struggled with a staggering number of different software applications, which hampered its ability to manage customer relationships and back-office operations.

For example, finance staff had to toggle between different systems to manage invoices, returns, and accounting. Productivity in the front-office was similarly compromised as sales staff using Salesforce couldn't convert sales quotes into orders without switching to a separate order-entry system. In consequence, revenue suffered because sales had to spend more time on account administration and less time on business development. Meanwhile, the lack of integration between systems deprived managers of key financial insights that could help them make better business decisions.

Gaining full quote-to-cash transparency

By adopting Intacct's cloud-based financial applications through the Salesforce AppExchange, Brightly instantly achieved front and back office integration. Changes made in Salesforce are automatically reflected in Intacct, and vice versa – and sales team never has to leave the familiar Salesforce interface.

The integration also allows sales to create orders directly in Salesforce. Intacct's cloud-based delivery enables field reps to verify pricing, review product selection, and check renewal periods in real time, information normally found in Intacct. The process of tracking orders is also transparent, allowing staff to assess order status and confirm fulfillment in real time.



360-Degree customer view boosts satisfaction

Integrating its financial management applications with Salesforce helped Brightly achieve an impressive 97 percent customer satisfaction rating. Customer support agents now have a 360 degree view of each customer, which means a single agent can address every customer issue, from order status to fulfillment to billing. Higher satisfaction has in turn boosted retention, freeing sales reps to target new accounts.

Meanwhile, Brightly reports lower costs due to data sharing among applications and the elimination of duplicative data entry. From a strategic standpoint, front and back office integration provides superior business intelligence. Instant alerts about new sales prospects, combined with real-time access to customer, pricing, and supply-chain information, allow Brightly to make smarter business decisions.

