

SUCCESS STORIES

Crestwood Associates Advanced Commissions Module Automates Complex Process

"I use the Advanced Commissions Module to help me make decisions. I can see how our sales team is progressing year over year."

- Jason Sheaffer

SCEO Crestwood Associates



LOCATION

North America

APPLICATION REPLACED

QuickBooks, Excel

SOLUTION

Crestwood Custom Solution

Commissions Module

The Challenge

Crestwood Associates advises key stakeholders on which technology solutions will have the greatest impact on their business goals through a proven process of reviewing technical system and processes, quantifying goals, and mapping out a plan of action.

Decades of industry experience and expertise have ingrained in the team that it's all about the user adoption rate. From traditional through the most contemporary implementation and support services, Crestwood's personalized deployment delivers solutions that are right for each business and every size budget.

Crestwood, like their clients faced challenges, however. Perhaps analogous to the shoemaker's wife having no shoes, the experts at Crestwood Associates were deeply invested in their clients' success, but the company itself was managing sales through Excel spreadsheets and a range of manual processes. This led to duplicate data entry, data entry mistakes, and an overall workflow that was slow, time consuming and frustrating.

The Solution

Due to an explosion of growth, and increased emphasis on software development, they needed to adopt their own advice. Working in tandem with Acumatica ERP, a module to address the commission process would do the trick.

The Crestwood product and development team works hand-in-hand to produce the best results for clients, and recommended the Advance Commissions Module. The automatic calculation and approval of commissions would save Crestwood hours a month, freeing leadership up to do more value added activities.

Key Results

- Insight to cash flow
- Reduced time spent on commissions by 80%
- Increased visibility to sales

The Outcome

The team immediately noted that the formerly laborious commission process is now completed in two hours. Not only does the Advanced Commissions module save about 10 hours a month in labor input, but CEO Jason Sheaffer says “We have happier employees.” He also can have a sense of cash flow based on real-time dashboards and GIs (WHAT IS A GI?) With the real-time data insights, the business can continue to grow and scale without additional labor expenditure. Mistakes are reduced and overall productivity is up.

Sales reps can now see their commission in real time to track how they are tracking according to their plan.

Commissions are submitted to payroll with one-click.

The automatic commission calculations across 10 different plans. Crestwood calculates over 7,000 line items a month and Advanced Commissions automates it all.

A background image of a hotel room with a bed, a chair, and a suitcase.

Are you ready to improve your business
with innovative technology?

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