




PURPOSEFUL CHANGE ENABLES RESPONSIBLE GROWTH

Salesforce Guru, Monica Bunch, Leader of SiFer Consulting, Makes Change Attractive for Business





CHALLENGE: SiFer Consulting was a new company that needed the right technology to grow with them. They started out using QuickBooks Online and had to perform manual reconciliation between their Salesforce org and their accounting system. As SiFer gained more clients, the amount of time it took to reconcile between systems for billing and time-keeping became a hindrance to their growth and ability to take on more clients. Since SiFer works with contractors for their services, reconciliations were recurring and far too complex for QuickBooks to handle.

SOLUTION: Native accounting was the answer! Accounting Seed was built on Salesforce and taps into the same power that Salesforce offers for customer relationship management. Now that SiFer has their accounting in the same place as their other applications, everything is seamlessly connected, alleviating manual processing. Additionally, the unlimited amount of automations that can be created in Accounting Seed has enabled SiFer to complete routine tasks in minutes, like revenue recognition.

“I SAID TO MYSELF, ‘I KNOW I HAVE THE EXPERIENCE, SO WHY NOT JUMP IN WITH BOTH FEET?’”

Starting your own business isn't easy, but Monica Bunch, founder of SiFer Consulting, is finding her way, and succeeding. Monica's background in software and product management led her to Salesforce technology, which she has worked with since 1998. From Salesforce's Service and Sales Cloud to communities and portals, Monica is a Salesforce guru who uses her skills to help businesses reach their goals through technology. "I love working with small to midsize businesses that are unsure of how the technology can work for them. Seeing the 'wow!' moment when they realize what technology can do for their organization is the most fulfilling part of what I do," said Monica.

SiFer Consulting, a registered partner with Salesforce, focuses on training and implementing Salesforce connected applications and products. Their goal is to align Salesforce technology with a customer's business processes and improve their functionality through automation and customization of the platform.

TAKING CUSTOMERS FROM “I CAN'T” TO “I CAN”

As SiFer continues to onboard businesses to Salesforce technology, they've run into one hurdle - change. Change is hard, especially for businesses that have matured their processes and are used to performing tasks in a certain way. Monica has discovered that SiFer is attracting two types of businesses. On one side there are family-run businesses that rely on processes that have been passed down to them. Then, there are larger companies that have multiple departments involved, and getting everyone on board is a challenge. "It can be hard to change. The idea of the not touching paper or having tons of Post-It notes on the desk is daunting. Part of what we have to do is show them how the technology makes them more valuable to their company and growth plans." Once Monica gets into their orgs and shows them the best way to use Salesforce, people are hooked, coming back to SiFer and asking, "What else can we do?" This question has also led SiFer to look at their own processes and technology.



BREAKING UP WITH QUICKBOOKS

“We’ve seen about 20% year-over-year growth since we started two years ago. Everything that runs this business I am striving to make better in my own time, starting with accounting,” said Monica.

As a new company, SiFer is conservative with growth goals and focused on enhancing their own business software to be poised for scalability. As a new business, Monica began with QuickBooks Online. While the system worked well enough, it wasn’t efficient. For a business that runs on Salesforce, to have accounting outside of the ecosystem meant regular, manual reconciling between systems for billing and time-keeping. Since SiFer works with outside contractors to help with implementation, reconciliations were recurring and complex, decreasing efficiency due to the time and energy needed to sync up one system with the other. “Honestly, it was a nightmare,” noted Monica. “It got to the point where I knew I couldn’t grow like this. I needed to find something already built into Salesforce, something with the same power.”

When sitting for lunch one day with her Salesforce account executive (AE), Monica brought up her struggles with the accounting portion. Quickly, her AE pointed her to Accounting Seed because of the native connection to Salesforce.

GOODBYE MANUAL WORK, HELLO AUTOMATION!

Monica’s knowledge of the Salesforce ecosystem and the automation capabilities came in handy when she made the switch from QuickBooks to Accounting Seed. In less than a few months, Monica and her accounting team have automated accounting tasks that once took days to complete. “I have been able to create so many automations, reports, dashboards - you name it. All of which allow us to perform accounting tasks in a snap. Things that took days now take an hour.”

While the move to Accounting Seed has proven to be a smart one for SiFer, there has been an adjustment period for her accounting team. Accounting Seed’s technology is vastly different than others. Like SiFer’s customers have experienced, change can be hard. “It’s a learning curve for the team, but it is so worth it,” said Monica.

RUNNING ON THE RIGHT TRACK

After two successful years, Monica is excited for the future and ready to bring SiFer Consulting to the next level. From marketing to accounting, Monica can see the path for growth better than she could a year ago and continues improving every aspect of her company. Looking to the future, SiFer is concentrating on niche industries within fields such as construction and manufacturing, helping them bring in the right technology to empower their businesses.

“We are able to scale businesses with the right technology because we are bringing the right technology in house to run SiFer. I can’t say enough good things about what Accounting Seed has done in helping me get my own business running right. And it’s only going to get better.”



To learn more about SiFer Consulting, visit siferfx.com



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