Panaya

EMBURSE SAVES TIME AND IMPROVES QUALITY OF SALESFORCE DELIVERABLES WITH PANAYA

Discover how Panaya helped Emburse's CRM Technology Team ensure business continuity and deliver peace of mind with minimal disruption to business users

emburse®

CUSTOMER PROFILE:

Software Development | Providing finance technologies and innovation that humanize work.

WEBSITE:

https://www.emburse.com

LOCATIONS:

California, USA; Maine, USA

NEED:

- Identify existing business configurations that would be affected by changes
- Proactively plan for potential roadblocks
- Conduct assessments upfront to avoid disruptions to Salesforce users
- Balance the need for speed and efficiency with the need for quality and accuracy
- Detect technical debt and organize a plan around it

THE IMPACT:

- Streamlined analysis process, saving significant time and increasing quality
- Quick and accurate estimations of work efforts
- Improved project rollout, minimized disruptions, and optimized deliverables
- Provides great peace of mind when planning new features and enhancements

ABOUT EMBURSE

Emburse is the global leader in spend optimization. Emburse's expense, travel management, purchasing and accounts payable, and payments solutions are trusted by more than 12 million business professionals, including CFOs, finance teams, and travelers. More than 18,000 organizations in 120 countries count on Emburse's intelligent automation, sophisticated analytics, and unmatched spend control to deliver positive financial outcomes.

THE CHALLENGE

The CRM Technology Team at Emburse aimed to deliver high quality and complete solutions while minimizing disruption to the business. Without conducting thorough assessments upfront, implementations of new features and developments could potentially disrupt the ability of Salesforce users to work efficiently and effectively. This meant that the team needed to be proactive in identifying potential roadblocks and planning for them.

One of the specific challenges faced by the team was the lack of an impact analysis for a CPQ reimplementation project. The team was planning to redefine opportunity types without considering the existing business configurations and customizations that would be affected by the changes. Without a comprehensive analysis, the project could potentially result in a massive system rebuild that would have failed to work with the business processes. This would have caused significant disruption to the sales business and could have resulted in weeks of lost revenue.
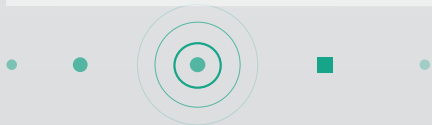
THE SOLUTION

To overcome the challenge of conducting a thorough impact analysis while balancing the need for speed and efficiency, Emburse turned to Panaya. Panaya provided Emburse with the ability to quickly and easily search their metadata, locate potential issues, articulate the scope of effort for any change, as well as organize a plan around technical debt.

The solution enabled them to identify all the places where a component might be living or referenced, and easily identify what Apex classes might include certain fields, even if they were no-code or low-code admins.

Overall Panaya saves Emburse's CRM Technology Team plenty of research time, and provides great peace of mind, shedding light on areas that might be missed or not obvious.

"The time required to run an analysis and conduct thorough assessments upfront significantly reduces the disruption to our business and improves the quality of our deliverables. Minimizing disruption to our business means our sales teams can focus on hitting revenue targets instead of fighting system deficiencies."

Linda Sirmans
Director, Digital Transformation Technology

THE RESULT

Working with Panaya delivered multiple benefits to the CRM Technology Team at Emburse, including significant time savings and increased quality. Panaya helped the team overcome daily challenges, such as:

- Research and learn a new environment, like CPQ, and find specific topics within

- Easily understand how different fields and objects interact with each other

- Onboard new team members and get them up to speed with Emburse's data model

- Ability to see how a component removal or name change impacts on related components

- Quick and accurate estimations of work efforts

- Ability to structure and organize a plan for managing technical debt

Using Panaya has streamlined the analysis process and helped ensure that any necessary changes could be made before the project was rolled out, minimizing disruption to the business.

ABOUT PANAYA

Panaya enables organizations to accelerate application change and continuously deliver innovation with its Change Intelligence Platform. Panaya provides cloud-based application delivery and testing solutions that ensure collaboration between Business and IT. Enabling enterprise agility with faster release velocity and uncompromising quality, Panaya delivers an optimized user experience with end-to-end visibility of the application lifecycle. Since 2006, 3,000 companies in 62 countries, including a third of the Fortune 500, have been using Panaya to deliver quality changes to enterprise ERP & CRM applications.