Boomi increases productivity by 70% and scales for growth with Smartsheet

With Smartsheet, Boomi can automate business processes to support explosive business growth while increasing efficiency and transparency.

boomi

Customer:
Boomi, a Dell Technologies business

Industry:
Technology

Organization Size:
1,200+ employees

Region:
North America

Website:
boomi.com

> "Smartsheet provides visibility that then kicks off the key questions that help me as a leader to drive the business forward. We've seen a productivity improvement of 70% in aspects of our support organization. We've been able to make 50% efficiency gains simply through transparency and visibility.

Chris Port,
Chief Operations Officer, Boomi

Boomi, a Dell Technologies business, powers the data economy by enabling organizations to instantly connect people to what they want.

Background
Boomi, a Dell Technologies business, has been helping companies integrate their systems and processes for 20 years. As Boomi grew from a few hundred to more than 13,000 customers, company leadership realized their tools and methods for managing processes and work needed to be able to scale at the same pace. Smartsheet has helped Boomi automate processes, improve efficiency and transparency, and enable data visualization — all while being easy to learn and accessible from anywhere via the cloud.

"Smartsheet has been an enabler and accelerant to our core culture of innovation and entrepreneurship," says Chris Port, chief operations officer at Boomi. *"We constantly question ourselves: With our 13,000-plus customers, how can we drive more innovation in their organizations? How do we drive more innovation into our product and maintain leadership? Smartsheet has been a facilitator to really allow people to innovate, to continue to be entrepreneurs within Boomi, and to really create unique solutions, applications, dashboards and projects."*

Solution
One of the greatest challenges to the majority of today's businesses is the fragmentation of business systems, whether that's siloed data, multiple platforms for a single function such as finance or logistics, or disparate communications channels. Boomi offers a range of integration platform as a service (iPaaS) solutions that connect everything in a business's digital ecosystem.

The company has grown explosively over the past several years, straining the limits of its systems for managing projects, business processes and communication. Boomi began looking for a platform that could scale easily, provide real-time information, enable data visualization, and be accessible from anywhere via the cloud. Smartsheet fit the bill.

Automation boosts efficiency and visibility

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One powerful feature of Smartsheet is the ability of individual users or even a team to automate certain functions themselves," Port says. "People all over Boomi take advantage of that. Our procurement function is a great example. With COVID, we've lowered the threshold for what leaders are allowed to spend without further approval. Over that threshold, it kicks off an automated workflow to me. I can ask specific people questions before I give an approval or denial, but I can also approve it right in the tool. It's another level of rigor that we've been able to put on to be mindful of the dollars we're spending, all fully automated.
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financial operations and spending, and monitor the status of sites that are being set up around the world. A special COVID-19 pandemic dashboard tracks not just employee health and well-being but customer needs and business forecasting and adaptations as the unpredictable health crisis plays out.

Key selling points for Smartsheet were its ease of adoption, dynamic functionality, and automation and workflows that increase efficiency across the organization.

"I very distinctly remember looking at specific features and functionalities," says DJ Krebsbach, chief of staff to Dell Boomi CEO Chris McNabb. *"Cross-functional workflow; the ability to instantly have real-time data and have different views. A CEO doesn't need to see the same thing as our CFO or somebody in engineering, but they do all need to see the same project roll-up. The cross-functional workflow ability was the number one thing I was looking for in a product, and then the other things just followed."*

Automation is another important feature that has saved Boomi significant time for a wide variety of processes. Krebsbach refers to her set of automated reminders as "Nag-Bot 2000," because they enable her to build accountability into the projects she manages without having to manually follow up with all the people who play a role. Each piece of the project has potential to affect the business outcome; automation helps ensure those pieces fall into place without requiring excessive time and effort for the project owner. And anyone can build automation into their own solutions.

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In a Nutshell:

Smartsheet makes it easy for Boomi to integrate data from disparate technology to solutions to create a single view of the business — not unlike the way Boomi integrates its own customers' technology in the middleware layer to drive business efficiencies.

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Dell Boomi

Taking technology integration to a new level

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Purchasing advisor Christine Lindgren saves time for herself and colleagues by using Smartsheet Data Shuttle and the Smartsheet for Salesforce Connector to pull information into Smartsheet without having to manually re-enter data. She can quickly update customer and sales records to get a real-time view of the business.

Taking the purchasing process digital transforms how teams work

Lindgren used Smartsheet to move Boomi's paper-based purchasing processes into the digital world. She started with a simple form to collect and forward credit approvals; now she has an automated system that captures purchasing and credit information in one place and alerts stakeholders to provide their information and see what actions are required of them.

"Smartsheet definitely gives the business a lot more visibility into all requests, and each stakeholder has visibility into their own requests," Lindgren says. *"It saves us a lot of time. Instead of paying someone to do these tasks, we just have Smartsheet doing them for us. It really lets our team do things that are less tedious so we can concentrate on higher-level work that's more interesting than data entry."*

Lindgren says it's easy to solve problems using Smartsheet. For example, when one of the company's processes was moving too slowly, she set up a solution with alerts and a daily snapshot

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Christine Lindgren, Purchasing Advisor, Boomi

that helps the team prioritize problem areas. And when the COVID-19 pandemic forced teams to work remotely, having the purchasing system already accessible through the cloud helped everyone keep working without additional disruption.

From new user to award winner in just a few years

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Krebsbach credits Smartsheet with her ability to accomplish more as well. A self-professed "whiteboard person," she's been able to replace her markers and sticky notes with a collaborative solution that's accessible to everyone. Her colleagues have seen how efficient she's become and want to follow her example.

"I really do enjoy when I'm in a meeting as a bystander and the executive asks, 'Where's the Smartsheet link to that?'" Krebsbach says. *"That's a moment of pride because they know where to look and what to look for, as opposed to saying, is it on track? It's great that it's on track, but who owns it? What are next steps? How do we create that deliverable as the executive team wants to create it? I truly get satisfaction when they say, 'Thank you for the update, but I don't want a PowerPoint; where's the Smartsheet link?'"*

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> Christine Lindgren

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