

Simple Energy: the efficiency experts practice what they preach

Customer

Simple Energy and RSM

Product

Shopify to NetSuite SmartConnector
Salesforce Sales Cloud for CRM
3PL custom integration with integrator.io

About Simple Energy

Simple Energy is revolutionizing how utilities engage with their customers with an innovative platform that manages Energy Efficiency Partner programs. Established in 2010, Simple Energy provides a SaaS platform, which offers an array of solutions that assist utility companies in activating their EEP programs. Once implemented, utility companies have a prebuilt foundation upon which to build out the entire EEP program apparatus, including utility-branded marketplaces, Rebates-as-a-Service, and much more.

As municipalities across the country impose more energy-conscious initiatives incentivized by grants, the utility is responsible for tracking necessary data. In this environment, Simple Energy has expanded impressively, offering energy products to 26 different utility marketplaces.

Background

With this proliferation in EEP programs in recent years, Simple Energy's platform became an important go-to solution for this market. Initially, Simple Energy used separate applications, such as Shopify and QuickBooks, to deliver its solutions. The company relied on custom integrations to move data across the application, which was hard to maintain and required constant maintenance with each new software update. Each iteration cost Simple Energy time and resources that might be better spent on innovation rather than putting out fires.

As Simple Energy grew, its existing integrations were not scalable. When the company engaged with RSM to implement its NetSuite instance, the subject of Celigo's integration platform came up.

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An intelligent customer conversation relies on a salesperson's ability to view past purchases, future purchases, support cases, and billing history. It's impossible to have that kind of 360-degree customer view without the Celigo Connector.

— **Emmanuelle Gutterman,**
CIO

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Web Sites
simpleenergy.com
rsmus.com

The Challenge

Simple Energy invested in leading applications such as Salesforce, NetSuite and Shopify, and each application plays a role in key business processes. However, the problem was how to get these systems to function together, avoiding data exports and manual data entry.

Simple Energy worked with RSM and Celigo to map key business processes for automation. The solution focused on:

- Optimizing the lead-to-cash process for the B2B sales cycle of selling a software platform
- Removing order entry bottlenecks for the B2C business
- Providing visibility across the supply chain, linking third-party logistics data to the core NetSuite ERP

RSMs functional consultants were able to manage the initial setup of the project and train Simple Energy staff.

Rob Ericson, a consultant from RSM's technology and management consulting practice led the effort. "We were able to get the systems integrated in a fraction of the time as a custom integration. After go live, we could turn the solution over to Simple Energy."

After implementing Celigo integrator.io iPaaS, Simple Energy can now spend more time innovating and refining its product, and devising new ways to integrate all of its business apps into one central hub.

The Solution

One of the most immediate benefits Simple Energy employees recognized when first introducing Celigo's integrator.io to the setup was the ease and simplicity in implementing integrations. With integrator.io's intuitive tools and dashboard, even without a systems background, users can establish data-exchanges between NetSuite and Shopify quickly and confidently.

"With Celigo, we can have functional consultants manage business requirements and build of the integration. This dramatically increases time to value," commented RSM Principal Matt Kenney.

Simple Energy has integrated all 26 Shopify instances so they can all be managed from a single NetSuite ERP platform. In fact, Celigo's solutions have been so extendable that Simple Energy plans to integrate all of their systems through the integrator.io platform, from CRM to Accounting to Fulfillment.

Furthermore, as the team at Simple Energy becomes more familiar with integrator.io, they understand just how much more they could do with it. For example, Simple Energy IS analyst Ryan Wible found the tool to be so simple and powerful he is convinced that a business user could do get the product up and running. "The capabilities are truly endless," said Wible.

The Bottom Line

At the end of the day, Simple Energy is all about providing solutions for energy efficiency. That philosophy not only permeates their products but also extends to the way they approach their operations.

"We needed to invest in technology that would allow us to effectively scale our business with added efficiencies and increase accuracy to support our top-line revenue growth," said Simple Energy CFO Derek Kraus.

In the same way that Simple Energy offers streamlined solutions to utility companies looking to roll out EEP programs, Celigo's integrator.io platform empowers innovative companies to efficiently connect all of the applications they need to deliver the most forward-thinking products and services.

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— **Derek Kraus**
CFO

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About Celigo

Headquartered in San Mateo, Celigo is pioneering the future of application integration. Celigo's SmartConnectors™ are prebuilt integrations that connect independent SaaS applications together seamlessly. These connectors are backed by the integrator.io, an easy-to-use integration middleware platform for building custom integrations.

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