



## Taconic Biosciences Creates A Single Source of Truth and Revitalizes Customer Experience

*Taconic Biosciences partnered with Apps Associates to improve its customers' experience and create a true 360 view of its business. This was accomplished by implementing Salesforce with real-time integration with multiple systems including Oracle ERP powered by MuleSoft.*

"I'd hire them again in a heartbeat. They are awesome. The entire team is dedicated, knowledgeable, responsive, and were relentless in making sure we were successful with the implementation. They even took on additional scope because they felt it was crucial to ensure our success. They put us first and for them, failure was not an option. They worked as hard as anyone I've ever worked with. I'm very happy I chose them."

**Nick Mitropoulos,**  
Senior Director,  
Global Commercial Operations  
and Customer Service  
Taconic

Taconic Biosciences is a global provider of genetically engineered rodent models and services. Founded in 1952, Taconic helps the biotechnology and pharmaceutical communities acquire, custom design, breed, precondition, test, and distribute highly relevant research models worldwide. Specialists in genetically-engineered mouse and rat models, integrated model design and breeding services, and precision research mouse models, Taconic operates service laboratories and breeding facilities in the U.S. and Europe and maintains distributor relationships in Asia.

Effective inventory management is crucial to Taconic, and so the business is very time sensitive. It's imperative for them to quickly respond to client needs as they operate in a highly competitive market.

"Customers build their projects around timing and availability," says Nick Mitropoulos, Senior Director, Global Commercial Operations and Customer Service for Taconic. "If we're not responsive to them, they'll find someone else to go to."

### Creating a More Efficient Workflow to Improve Customer Service

Taconic runs on Oracle E-Business Suite (EBS) for most functions including inventory, finance, accounting, and purchasing. Their customer management landscape consisted of Oracle CRM and a series of databases. A number of manual processes needed to be automated to streamline the workflow from lead to customer resolution.

Taconic wanted a complete view of the customer and more real-time information readily available to the sales teams and executive management. Following up on leads and prospects was a labor intensive process which resulted in more time spent preparing for customer meetings and less time discussing business opportunities and serving their customers. Taconic managers needed a solution that would allow them to quickly and simply focus on their customers.



Taconic identified five main objectives for their desired solution:

- 360 degree view of the customer
- Real time information
- A single, cloud-based solution supporting their end-to-end process, from lead to customer resolution
- Mobile capability
- Best in class technology

## Apps Associates' Launches Two-Phased Approach to Salesforce Optimization

After evaluating several possible options, Taconic settled on Salesforce. "I had experience using Salesforce and they checked all the boxes for what we needed," said Mitropoulos. "We decided to build our workflow around the Salesforce processes from lead to cash to customer resolution. We also wanted to include marketing, sales, and customer support."

Taconic then chose Apps Associates to design and develop the solution.

campaign in Salesforce, tying marketing spend directly to sales. Apps Associates also helped develop the complex lead routing threshold as to when the lead would automatically move from HubSpot to Salesforce and to the right account rep at Taconic.

As part of the initial phase, Apps Associates also leveraged the Salesforce Service Cloud to deliver a complex customer service feature set around cases, case automation, escalation, entitlements, and SLA's. The project included a full Account, Contact, Case, Case Comment and Attachment migration from Zendesk to Salesforce with automated email to case, web to case, case creation and management, and case transfer to sales when quoting was requested.

This phase also included automating the quality assurance process to manage and remediate variances, and moving it from Oracle to Salesforce to more closely integrate QA with customer support and sales processes.

Apps Associates also worked with Taconic to set up customer, partner and employee communities. These Communities (or 'portals') in Salesforce allow external customers, partners, and resellers to manage their Cases, Opportunities, Leads, and Accounts within Taconic's Salesforce Org. This helped Taconic automate partner lead creation, provide leads, track opportunities, view sales

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"Taconic had an existing relationship with Apps Associates, and from a Salesforce and Oracle expertise standpoint, they were very successful, productive, and efficient," says Mitropoulos. "I liked their approach right from the start. It was important that they understood our Oracle data structure and data set and Apps Associates did because they had helped build it."

Using a two-phased approach, the Apps Associates team focused on automating and optimizing Salesforce to resolve the issues Taconic was experiencing.

The first phase involved implementing the Salesforce Sales Cloud, including integration with HubSpot. This marketing automation integration, along with robust Lead, Campaign, Account, Contact, Activity and Opportunity Management for which Salesforce is well known, allowed for complete visibility from lead capture to Opportunity close.

Apps Associates also worked with Taconic to set up appropriate rules for lead scoring and tied everything to a

pipeline, and manage partner cases. The Customer Community provides customers a view of the status of their cases and orders, and the Employee Community allows for Taconic employees to closely follow, and contribute to, internal incidents.

Phase two was focused on integrating Oracle E-Business Suite and Salesforce. Matching ownership in Oracle CRM was tricky due to the many identities Oracle creates for each user. Using the Mulesoft integration platform, Apps Associates was able to match the complex logic from Oracle to Salesforce by setting up bi-directional, real-time updates for accounts, addresses/sites, products, price books, sales orders, and sales order lines.

This phase also leveraged Salesforce Wave Analytics to provide a holistic view of customers and prospects including - opportunities, bookings, pipeline, and quotas, using data from both Salesforce and Oracle.

## Rapid Implementation Yields Huge Benefits

Taconic stakeholders wanted a quick resolution and didn't want to wait for possible delays of an enterprise-wide project. Working together, Taconic and Apps Associates had the system up and running - on budget - in less than six months. Now, business decision makers at Taconic can view and act upon sales and customer data each day with information updated daily.

"I can see daily shipments in three dimensions – by region, by product family, and by market segment," he says. "We can even get it down to item code and sales rep. We are able to look at opportunities, order bookings, and backlogs. Our CEO, VP Sales, and all the sales people are looking at this data every day."

The new system opens additional capabilities for measuring customer satisfaction, lead generation, order activity, and revenue. Taconic has created activity baselines and customer surveys – which are now much easier to do.

Salesforce is even more effective because it has become widely adopted throughout the organization. Customer facing personnel can spend more time in front of Taconic clients because of the time saved automating manual processes, and Mitropoulos believes that this will translate into increased revenue in the long run.

## A Productive Partnership

"I'd hire them again in a heartbeat," Mitropoulos says of the Taconic relationship with Apps Associates. "They are awesome. The entire team is dedicated, knowledgeable, responsive, and were relentless in making sure we were successful with the implementation. They even took on additional scope because they felt it was crucial to ensure our success. They put us first and for them, failure was not an option. They worked as hard as anyone I've ever worked with. I'm very happy I chose them."

## ABOUT APPS ASSOCIATES

Founded in 2002, Apps Associates is a global provider of business and technology consulting services that partners with companies to help them maximize the value from their IT investments. Services range from new technology deployments to 24x7 global support services with practices in BI, ERP, CRM, Integration, Cloud Services, Infrastructure, Testing Services and Custom Development.



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