

## AIPEX

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### At A Glance:

- **Company:** A technology consulting firm with a particular emphasis on providing experts in highly specialized domains.
- **Industry:** Consulting
- **Location:** Melbourne, Australia
- **Software switched from:** MYOB
- **Integrations:** NetSuite CRM, NetSuite Financials
- **Challenges:**
  - Australian consulting firm had no faith in their forecasting capabilities.
  - Month end figures took 16-17 days to prepare.
  - Business processes provided little potential for growth.
- **Results with OpenAir:**
  - Savings. Overhead greatly reduced due to user adoption of time and expense tracking.
  - Visibility. Company can now build powerful revenue and utilization reports.
  - Simplification. Billing cycle reduced from 17 to 3 days.
  - Insight. Finance Director now has the ability to answer complex business questions.

*“OpenAir has the most robust integration capabilities in the industry. They have built a seamless flow that streamlines our entire business.”*

— Trevor Townsend, Director, AIPEX

### Results

Services resource planning, the combination of NetSuite’s CRM and ERP with OpenAir PSA, provides AIPEX with a unified platform to run its entire business. With a seamless integration between OpenAir and NetSuite, AIPEX has a streamlined business workflow that has improved efficiencies across departments. For example, the organization is now able to process invoices within a day and close out a month in three days rather than seventeen.

Above all, OpenAir and NetSuite have provided AIPEX with complete visibility into its business. With a base of information in the system, the organization can now develop forecast and historical reports to detect trends in their revenue and resource allocation.

As a result, AIPEX now has the insight into which projects and consultants are making the most money as well as what line of business is the most profitable. This enables the organization to pursue profitable business while at the same time avoiding those types of projects that lost money in the past.

“Our Finance Director now is able to answer any question about our business. Previously, our finance team would scramble at the end of a period to gain limited insight into how we performed historically. With OpenAir and NetSuite we have real-time metrics that arm us with the data to make sound investments and business decisions.”

### Challenges

Before OpenAir and NetSuite, business processes at AIPEX provided no platform for growth. Invoicing data was entered and stored within the organization’s client-server financial package, MYOB. Since timesheets were manually faxed in to the Melbourne head office, reentry of data was required to log time figures in spreadsheets and then enter them into MYOB for client billing.

This system created a complete lack of confidence at AIPEX. “We had no faith in our forecasting capabilities,” said Townsend. “At the end of each month, we tried to work out how we performed historically but could not come to results for 16-17 days.” As the organization

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began to grow, it was evident that a system to modernize their business processes was necessary to guarantee their success.

Through an online survey, Trevor began the selection process for a PSA system. The main criterion that was essential to his decision was that the system be a hosted offering with online access. “We had no desire to constantly maintain and keep operational our new system,” said Townsend.

“Our desire was to reduce overhead work, not create more.” With consultants constantly out of the office at client sites, it was also critical that they could enter time, claim work related expenses, and update project information from any internet connection.

### The Solution

After experiencing great success with OpenAir’s Software as a Service (SaaS) platform, AIPEX looked to transition its entire business to the cloud computing model. As a result, the company signed on with NetSuite to satisfy its sales force automation (SFA) and financial needs.

OpenAir fully integrates with NetSuite CRM which allows for AIPEX sales opportunities to be pushed into OpenAir as projects. On the back end, revenue transactions and expense reimbursements are funneled into NetSuite Financials and mapped to the appropriate general ledger codes and vendors. “OpenAir has the most robust integration capabilities in the industry. They have built a seamless flow that streamlines our entire business.”

Due to these integrations, AIPEX has saved considerable amounts of time and money that were previously dedicated to manual reentry of data. The combination of OpenAir and NetSuite enables AIPEX to run its entire business on the cloud computing platform. With a low combined total cost of ownership (TCO) OpenAir and NetSuite eliminate costs associated with system maintenance and IT support.

After making a significant investment in OpenAir and experiencing real results, it is comforting to know that OpenAir is a system that can grow as your company grows. “The most satisfying aspect of my decision is seeing how OpenAir continues to evolve,” said Townsend.

“The system will never become stagnant as OpenAir is constantly updated every six weeks.” The system has proven that it can scale to meet the needs of AIPEX as it grows and expands.

“Every new employee at AIPEX is added as an OpenAir user the day they start with us. This allows us to track their performance and skills from day one and ensure that all our critical corporate information is cataloged in a single, secure system.”



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