

CASE STUDY

SD Mayer & Associates: Partners in NetSuite

SD Mayer & Associates, LLP is an accounting and consulting firm located in San Francisco, California. Since 2012, SD Mayer has provided a range of traditional audit advisory, tax and outsource services, including wealth management and retirement programs. SD Mayer also has an experienced technology practice to help their clients leverage the latest technologies with their financial suite. As a major partner and solutions provider for NetSuite, SD Mayer implements and customizes the NetSuite platform. The firm also has sustained partnerships with other tech giants like Avalara, Bill.com, and DocuSign.



The Problem

SD Mayer started out with an 8x8 Hosted VoIP solution, due to its integration with NetSuite. But while 8x8 is one of the only providers with a viable NetSuite application on the SuiteApp exchange, the integration proved to be finicky at best. It was vital that SD Mayer found a service that could streamline the application experience.



At a Glance

SD Mayer is a California-based CPA firm with an emphasis on technology consulting and cloud services. Since SD Mayer is a certified NetSuite solutions partner, they needed a VoIP service that could also effectively integrate with NetSuite. Their existing service with 8x8 couldn't meet that challenge. After partnering with Jive, SD Mayer has begun to create a custom application for NetSuite that relies on the simplicity and quality of the Jive service.



CTO Mark Magel also noted that there were ongoing issues with call quality. “Our desktop phones were being underutilized, mainly because everyone would forward to their cell phones rather than risk the call quality issues,” said Magel. In particular, the phones wouldn’t dial out to select numbers, and the conferencing system was difficult to manage. As a result, SD Mayer began to look for a new VoIP phone system, one that could deliver on both quality of service and customization.

The Solution

As a CTO, Magel was already familiar with most of the VoIP offerings on the market. “I knew we weren’t going to go with Avaya or a similar self-hosted service, since that can be a drain on time and resources,” said Magel. “And I’ve used both RingCentral and 8x8 over the past several years, so I know the key problems associated with both of them.”

However, Magel remembered a Jive representative from his previous company, and he gave the rep a call. “I asked him if Jive had done anything with NetSuite, and I was impressed that he immediately offered to partner on an integration,” said Magel. That willingness to collaborate propelled SD Mayer to select Jive as their new VoIP service.

Jive’s experience with nonprofits and schools was an added bonus, since SD Mayer services many public sector organizations. “We were very happy to hear that Jive does so many deals with schools, since that represents a portion of our customer base. This partnership will help us tie in the benefits of E-rate for our clients that need it,” said Magel.

PARTNERSHIP WITH JIVE

After signing up for service, the developers at SD Mayer have worked closely with Jive to create a new NetSuite application. In particular, the application will target small business owners who need lighter and more cost-effective versions of contact centers. “These smaller businesses using NetSuite really need an effective integration so that they can route calls

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MARK MAGEL, CTO



depending on whether it's for a service person or sales representative," said Magel. Once SD Mayer's developers complete the application, the Jive product team will add the finishing touches.

Additionally, SD Mayer will partner with Jive for an event at the SuiteWorld expo in May 2016. Sponsored by NetSuite, the annual expo celebrates cloud computing and features keynote speakers from a range of industries. SD Mayer will be introducing the Jive application to clients and partners at the event.

FEATURE HIGHLIGHTS

SD Mayer needed a phone service that could integrate well with NetSuite. They also needed improved call quality without overtaxing their voice budget. Here are just a few of the ways Jive helped to fill these needs:

Cost-Effective: In order to make the transition from 8x8, SD Mayer had to keep costs at a minimum. Luckily, Jive offers a flat monthly rate determined by the number of users per system. Within that flat monthly rate is an all-inclusive set of features essential for a consulting firm, like auto attendants.

Quality of Service: One of the major problems with SD Mayer's previous service was the call quality. When the phones can't dial out or the service is choppy, it can hurt a firm's ability to reach their clients. But by providing a world-class customer service team and a stable voice solution, Jive can help eliminate that problem in the long term. As

Mark Magel noted, "A phone's a phone: as long as it works and the quality is good, then I'm happy."

Beyond SuiteWorld

SD Mayer & Associates is looking forward to a continued partnership with Jive, both for the NetSuite application, and for future projects yet uncharted. In particular, SD Mayer is eager to use Jive's new web-sharing application, Jive Desktop, which is currently in private beta testing. With the combined power of SD Mayer and Jive, there's no telling what new innovations might follow.

See more at jive.com/customers.

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