Kiteworks

Revolutionizing Orders and Renewals for Maximum Efficiency and Security
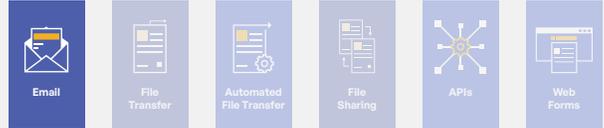
Processing Orders: A Critical Business Function

Most every golfer is familiar with the mantra, "drive for show, putt for dough." A long drive off the tee, in other words, may draw lots of "oohs" and "aahs" but the ability to sink a four-foot putt and preserve a two-stroke lead after 17 holes is what separates good golfers from great golfers.

There are parallels in the business world. Salespeople, for example, are lauded for closing big deals. But the salesperson has only negotiated the deal. It falls to someone else behind the scenes to ensure the order is fulfilled and the invoice is delivered so payment can be received and revenue can be recognized.

At Kiteworks, this critical role is filled by Marissa Kandarian, Director for Worldwide Orders and Renewals. For every new order, Marissa and her small team send the customer an email containing a summary of their order and a license file attachment.

For the uninitiated, a software license is a legal document that lists what the customer purchased (software, maintenance, support, add-on, etc.) and gives the customer written authority to use the software as intended, by an agreed upon number of end-users. The license ultimately establishes a legal and technical relationship between the software manufacturer and the customer.

Realizing "We've Always Done It This Way" Isn't the Only Way

Every order is unique and therefore every license is unique. The license is also confidential, as it contains what the customer just purchased, added, or renewed. Previously, Marissa attached the license to an email and sent it to the customer through Microsoft Outlook. Marissa explains, "Before Kiteworks, email was our only option to send licenses. Once we launched Kiteworks, we still sent licenses through email out of habit. We would process the order, save the license to our desktop, compose the email, attach the license, and send it to the customer. Altogether, it took about 20 minutes per order. While it was inefficient, we had grown accustomed to processing orders this way."

Kiteworks' Chairman and CEO Jonathan Yaron joined the company in 2017 and looked for ways to promote the use of Kiteworks internally. Order fulfillment represented an interesting use case. Today, Kiteworks is integrated with a homegrown solution called AOPS to generate a license. Think of AOPS as a joint customer relationship management (CRM) and configuration, pricing, and quoting (CPQ) system. Once a sales representative enters a customer's order details into AOPS, such as a hybrid cloud hosted deployment, advanced governance add-on, 200-seat licenses, etc., Marissa and her team generates a license and sends it to the customer via Kiteworks.

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>
> – Marissa Kandarian, Director for Worldwide Orders and Renewals

"Once Kiteworks was integrated with AOPS and our license server, sending licenses became not just more secure but easier as well," she says. "What once took 20 minutes now only takes a minute or two. I simply go to the fulfillment page, click 'attach license,' and then click 'send.' Kiteworks sends the email and the license within minutes of processing the order. Customers are amazed by the quick turnaround."

Protecting Sensitive Content and Accelerating Revenue Recognition

Marissa and her team similarly leverage the Kiteworks integration with AOPS to process order renewals. She creates the renewal quote within AOPS, loads it and the recipient's email address into a Kiteworks email, attaches the renewal form, and sends it to the customer.

As with fulfillment orders, it's imperative for Marissa to use Kiteworks since she is sharing sensitive information. In this case, however, the sensitive information being shared is Kiteworks' banking information, as every renewal order contains an invoice with wire instructions.

To facilitate payment, Kiteworks can be configured so that the renewal order and invoice can be sent to a customer's Accounts Payable department, which typically uses an email alias (e.g., accountspayable@XYZcompany.com) and anyone who is a part of that distribution list can access the email and its attachments with their individual username and password.

Marissa utilizes Kiteworks' read receipt capability so she and Kiteworks' Account Receivables department can help ensure that customers remit payment on time. "The read receipt function is great, especially when we send the renewal order and invoice to an AP alias," notes Marissa. "I can see who on that distribution list downloaded the file and when."

Every email, whether a fulfillment or renewal order, is logged in Kiteworks and auditable should Marissa or Kiteworks' security team need to demonstrate it is handling customer information in accordance with data privacy regulations and security standards.

While Kiteworks is currently deploying a new CPQ solution that will replace AOPS, the new system will also integrate with Kiteworks. As a result, Marissa and her team can continue to send licenses and invoices autonomously.

Looking back, Marissa can't believe she previously processed new orders and renewals manually. "Kiteworks has revolutionized our processes, making my team significantly more efficient. The sooner we can ship an order, the sooner we can invoice and receive payment. The fact that we're sharing sensitive information securely is simply icing on the cake."

Needs

- Deliver order confirmations and software licenses to new customers efficiently and securely
- Reduce the number of manual touches in the fulfillment process
- Send invoices containing wire instructions and banking information securely, even to an email alias

Kiteworks Solution

- Secure email capability
- Integration with homegrown and best-of-breed CPQ platforms
- Full audit trail to track who receives and downloads a Kiteworks software license or invoice

Business Impact

- Reduces time to process and deliver software licenses by 98%
- Virtually eliminates risk of unauthorized access to sensitive customer and Kiteworks content
- Provides an auditable and governable process for distributing software licenses and invoices
- Enhances customer experience by accelerating order processing from days to minutes

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