

# Yoxel sync for Salesforce helps Harbor Capital Advisors to capture meaningful activity information that provides the right level of detail to sales teams, saving them countless hours each month

## Case study

Harbor Capital Advisors;  
Yolande Anjargholi,  
Manager - CRM  
Technologies; Chicago, IL

## Client profile

Harbor Capital Advisors is a national financial and management consulting firm.

## Employees

150-200

## Website

[harborfunds.com](http://harborfunds.com)

## Industry

Financial services

## Results

- ★ Harbor estimates that each member of its distribution team (i.e. sales team consisting of +60 people) saves 15-20 minutes each day, or 300-400 hours every month using the Yoxel sync platform.
- ★ Yoxel's automated syncing frees the distribution team to spend less time on manually entering sales data-critical email and meeting information – and more time focusing on prospects and clients.
- ★ By configuring automated sync rules, the CRM technologies team is able to seamlessly manage a high-volume Salesforce database, while ensuring that the data feeding executive reporting is accurate and meets the needs of the business.
- ★ Harbor can keep the integration in-line with business requirements as they evolve, since Yoxel provides customized solutions and fine-tuning to the synchronization of records, as needed.



## About Harbor Capital Advisors

Harbor Capital Advisors is dedicated to helping its clients to achieve investment objectives with an active, cost-aware investing approach. With offices in Chicago, IL and Boston, MA, Harbor Capital Advisors employs just under 200 employees, 60 of which work in the distribution team managing sales and customer support inquiries. The CRM technologies team manages the company's Salesforce environment and provides support to office-based and remote staff.

## Initial challenges

Harbor uses Salesforce to manage all of its prospecting and sales activities, to track sales performance, and for reporting. Their database has grown over the years and now includes more than 600,000 contacts and 50,000 account records. Even though Salesforce is the main repository of company information, the distribution team members are heavy users of Microsoft Outlook and prefer to work in that application for daily emails and meeting scheduling.

The distribution team initially used the Salesforce for Outlook add-in, to transfer email, calendar, and event data to the CRM. This tool wasn't providing the level of automation needed and was causing the sales staff to spend a significant amount of time each week and manually entering data. Not only was the process

labor-intensive, but it also caused data entry errors and inconsistencies. Because the executive team relies heavily on Salesforce reports for customer insight to make strategic decisions, it was imperative to resolve the reporting inaccuracies.

## Harbor Capital Advisors looks for a better syncing solution

In late 2020, Harbor decided to evaluate several solutions that sync Outlook data with Salesforce. There were several free and paid options that the CRM technologies team considered: Outlook Integration, Outlook Integration + Inbox, Einstein Activity Capture, and Einstein Activity Capture + Inbox.

Ms. Yolande Anjargholi, Manager for CRM technologies, led the evaluation efforts. "We installed a number of different applications in our test environment, and did an exhaustive evaluation of each," she noted.

Working in conjunction with Pradeep Tekkey, Harbor's Senior Vice President (SVP)/Chief Technology Officer (CTO) and Jean Kaihatsu, Senior Vice President of Distribution & Intelligence, the CRM technologies team simulated many of the routine processes the distribution team performs each day.

"The feature set, functional capabilities and configuration options in of Yoxel, along with the ability to tailor and configure it to meet our specific needs, proved Yoxel to be far better than other applications,"

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commented Ms. Anjargholi. "The solution had to offer notable improvements otherwise our company would not pay a third-party vendor, for an add-in that we were already getting from Salesforce for free."

### Yoxel's syncing flexibility stands out

When a sales rep gets an email in Outlook or creates a calendar meeting, Harbor wants to sync that data to Salesforce, and attach it to the appropriate account, contact, or opportunity. "Granular control of what data syncs, the direction it syncs, what fields are populated in Salesforce, and whether the process is automated or manual, were some of our most important requirements," Ms. Anjargholi shared.

"The business rules in Yoxel let us easily create, modify, and control all aspects of syncing. We don't require vendor support to manage this process."

### The solution – An effortless implementation

Once Harbor selected Yoxel, the CRM technologies team had the application up and running and completed all its internal testing within one week. Ms. Anjargholi explained, "The installation process was easy and intuitive. We simply downloaded a package from Salesforce App Exchange to our pre-production environment, and then followed a guided configuration process to set our sync rules."

#### CUSTOMER QUOTE

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Yolande Anjargholi

"We conducted numerous syncs to fine tune our configuration before we installed and configured it in production. The Yoxel team was more than happy to get on the phone, share best practices, and help us."

### Training of Harbor Capital Advisors' users

Product training was made easy because Yoxel's Outlook add-on is simple and intuitive. "Our team created a user guide and conducted a short training session that we recorded," said Ms. Anjargholi. "Our sales professionals loved the fact that the add-on loaded quickly, surfaced Salesforce information directly in Outlook, and that they no longer needed to take any manual action to sync events/emails to Salesforce."

### Harbor Capital Advisors results – accurate, consistent information in Salesforce and time savings for sales team

Using Yoxel meant that Harbor can sync information between Outlook and Salesforce in a way that works for their business. Synchronization frequency, direction, level of automation, and target/destination fields were tailored in accordance with Harbor's business requirements, ensuring activities in Salesforce are created consistently, and with the correct fields populated / updated. Additionally, transitioning from a manual process to an automated one, was a big win.

### World class client support

"The level of customer service Yoxel provides our team has been extraordinary," Ms. Anjargholi emphasized. "They are very responsive to questions we ask whether via email or phone. No matter how small the problem is, they investigate it thoroughly, and figure out the root cause. We get answers back the same day, and usually never wait more than an hour for a response," she related. "This is very important because synchronization problems can be complex and there's only so much we can do as admins, architects, or developers to find solutions. By providing understandable explanations and answers, the Yoxel team saves us a tremendous amount of time."

### About Yoxel

Yoxel is a smart inbox add-on and integration solution for Salesforce that increases user adoption and improves data accuracy.

To learn more about Yoxel's automatic integration of calendar events, contacts, emails and tasks for Salesforce, or to download the application, visit: [www.aurinko.io/yoxel](http://www.aurinko.io/yoxel) or contact us at [info@yoxel.com](mailto:info@yoxel.com).