



Zoom supports boom in channel business with Nintex

Zoom Video Communications, Inc. leveraged Nintex Workflow Cloud to scale its manual channel order process and support an unprecedented boom in demand due to COVID-19.

Organization

Zoom Video
Communications

Website

www.zoom.us

Industry

Communications

Country

United States

Business situation

Zoom already needed to scale up its processing of channel orders to meet rising demand when the company experienced a boom in business during the COVID-19 crisis. Then, the need became critical.

Solution

Zoom replaced its largely manual order tracking and management process with a solution built on Nintex Workflow Cloud that integrates with Zendesk and Salesforce to automate the steps from order intake through purchase-order confirmation and provisioning.

Benefits

Supports significant increase in channel business

1/3 reduction in staff contractors

Boosts competitiveness

Business is booming—and that's the problem

It's the kind of problem every business wants to have. But not every business finds a way to solve it.

With businesses, schools, and organizations of all types moving their activities online in response to the COVID-19 pandemic, the demand for video communication services has skyrocketed. And perhaps that's most true of all for Zoom, the company that's become synonymous in the public mind with video conferencing. Total daily meeting participants soared 30X in four months with a 354% increase of customers with more than 10 employees compared to the year before. Even Zoom's more narrow channel market, which serves enterprise customers via distributors and other partners, saw new orders jump fivefold.

Processing and tracking those new channel orders to the point of provisioning had been a challenge for Zoom even before the surge of new business that's been termed "the Zoom Boom." With that surge, managing new orders looked to become a hugely expensive process—if it even could be managed in the traditional way.

The bottleneck was a set of manual processes based around email and spreadsheets. Months before the pandemic, Zoom had moved to a combination of Zendesk for order tracking and Salesforce for order management. It was a big step in the right direction, but still required Zoom personnel to handle each order six or more times, including follow-ups to the large sales team to create quotes and obtain approvals, and to the provisioning team to implement the new accounts.

Wanted: workflow that's flexible, automated, and scalable

"I was impressed by the flexibility and consistency of Nintex and how much it could get out of Zendesk and Salesforce."

— **Yesenia Orozco**, Channel Operations Manager, Zoom

Zoom considered and rejected a robotic process automation solution as lacking the flexibility the company needed to deal with numerous channel partners, each with its own requirements for purchase orders, email confirmations, and other documentation. Instead, it needed a flexible, highly automated, and highly scalable workflow solution. It needed Nintex.

Zoom worked with Pacific BPA, a Nintex Premier Partner, to design and deploy a solution on Nintex Workflow Cloud. When a new order is entered in Zendesk, it triggers the workflow, which automates all interaction between Zendesk and Salesforce. As the business processes move from new order to provisioned order, the Nintex workflow updates all systems, automates reminders to the sales team to create partner-specific purchase orders, and sends notifications of status updates to the channel operations, sales, and provisioning teams.

Yesenia Orozco, Channel Operations Manager at Zoom, and Pacific BPA's Alex Viera took just three weeks to build and test the solution, which went live on April 1, 2020. "It was just Alex and me, and we made the process great," says Orozco. "I was impressed by the flexibility and consistency of Nintex and how much it could get out of Zendesk and Salesforce."

Great process, great results

The process was great, and the results exceeded original expectations. The workflow handles 90% of orders, fully 50% more than Orozco expected. It even sends 100% of the confirmation emails, 150% more than expected. As a result, Zoom is handling that 5 times increase in channel business and doing so more efficiently and cost-effectively than before.

That makes a huge difference to Zoom and its partners. Partners now know that they'll get confirmation emails, and when they'll get them, they're sending far fewer service tickets to check order statuses—which minimizes the resources that Zoom has to devote to those tickets. Moreover, some partners only pay Zoom when they receive confirmations—which means the payment process is now faster with few issues.

“With the Nintex workflow in place, we had the smoothest end-of-month close with our largest partner that we’ve ever had,” says Orozco. “With real-time confirmations, our team didn’t have to stay late at the end of month to make sure everything went through – it was a significant improvement.”

She also points out that attempting to handle the increased order load with more people wouldn’t just have been far riskier—it would have been far more expensive. Orozco estimates that without the Nintex solution, Zoom would have had to increase its contract staff by one-third to support the growing demand.

“The amount of manual touches we needed was very difficult for us even at the lower, pre-COVID-19 volume. We would never have been able to keep up without our use of Nintex. Now, we’re not only keeping up with much higher volume, but we’re sending out auto-confirmations to partners consistently and in real time, as opposed to taking up to three days.”

— **Yesenia Orozco**, Channel Operations Manager, Zoom



Now positioned for “massive growth”

But the impact of that considerable savings pales next to the way that Zoom’s use of Nintex positions the company for massive new growth.

“Nintex has completely changed our channel order management business,” says Orozco. “It’s proved to be highly scalable and that positions us to compete against much larger companies for the next level of business. And this extends beyond just our channel operations. We’re using Nintex workflows with our support team and the entire operations team. We expect to use Nintex across the entire organization.”

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

Product or service names mentioned herein may be the trademarks of their respective owners.