

## way beyond help desk: how Issuetrak uses Issuetrak software

In the typical organization, setting up a new employee to start work requires multiple steps – and countless calls and emails – with staff across the company: human resources, payroll, information technology, facilities, training and management.

Yet at software maker Issuetrak, the hiring manager simply initiates what's called a Quick Pick, a template that defines the workflow for a certain process. The Quick Pick kicks off 20 different steps in the new employee setup process that automatically notifies everyone involved in ramping up for a new hire about their respective steps:

- HR knows to create an offer letter and prepare the new hire packet.
- Payroll prepares to add the new employee to the payroll system.
- IT and facilities staff set up the office, phones, computers and network accounts.
- HR schedules the onboarding meeting to discuss benefits and corporate policies and procedures.
- The employee is scheduled for orientation, training on the software and a time to meet senior leadership.
- Other steps include adding the employee to the various telephone lists and meeting requests.

Every person involved knows exactly what to do and when, ensuring everything is ready when the new face arrives for work the first day.

"It's important that our new employees have a sense that they are beginning their career with a company that is prepared for them to join our team on their first day of work. They feel welcome and think, 'Wow, they are ready and waiting for me to come in,'" says Deb Gillies, Human Resources Manager at Issuetrak.

At Issuetrak, those great first impressions extend well beyond new hires. From product demos to setting up new customers to technical support to product development, Issuetrak has built a reputation for responsiveness across the company.

"great way to get business processes done"

While the company's people certainly make a difference in providing such service, most employees will tell you that it's the company's dedication to using its own software. Every employee actively uses Issuetrak to help get things done.

"Innovation doesn't just mean new products, but business processes as well. We find Issuetrak is a great way to get all our business processes done," says Hank Luhring, founder of Issuetrak.

Like many of its more than 1,900 customers, the company has found Issuetrak indispensable in expediting tasks in departments well beyond the help desk. The



result? A rare level of efficiency, communication and service both internally and to their customers.

## corporate operations

The Corporate Operations instance of Issuetrak drives a number of processes that cross multiple departments, and most teams likewise use the software for their own internal processes. A testament to the software's flexibility, the IT department customizes each instance to look and flow exactly the way each department requires.

Meanwhile, the Development team heavily leverages the software for change requests, bugs, hot fixes and testing. When change and patch requests come in, they are assigned to a developer. From there, Issuetrak follows the issue through testing and any additional required development before closing it out.

Throughout the process, each person passes along important notes, such as attaching test scripts to the issue and providing notes that the company's technical writer needs for documentation.

"Issuetrak is a very easy way for developers and quality assurance analysts to communicate with each other," says LaDonna Beauregard, VP of Development. "They can attach screen shots, send notes, change the status, and go back and forth until it's resolved."

Plus, all that activity is documented clearly and carefully, giving Beauregard a dashboard snapshot on the number and type of problems found and fixed. For a new release,

reports provide at-a-glance details about what's new, providing critical information for the tech writer and Marketing team.

In fact, applying Issuetrak to processes has become so ingrained in the company's culture that managers and employees continuously think of new ways to use it. The Professional Services team taps Issuetrak to schedule all customer training and associated tasks. Customers can also submit requests for service directly via email, which automatically creates a ticket and notifies the team to take action. As an added benefit, the team tracks all its billable and non-billable time in the software.

## facilitating first impressions

Customers benefit as well from the company's widespread use of the software. Many prospective customers notice the responsive nature of the company's sales team, but may not realize the Issuetrak software processes behind their product demos and evaluation sites. Sales Engineers kick off the process with a Quick Pick that cues various team members to get the product evaluation ready.

And it all happens rapidly. For example, in response to a Sales Engineer's recent evaluation request, Dana Jackson-Haddon, Client Care Coordinator, had processed and

sent evaluation information to the customer within six minutes. The Issuetrak process ensures she hits every task and that all involved receive notifications.

"You don't have to remember what to do next," she says. "Those processes are laid out, which allows me to save time and work on



multiple things. Nothing slips through and it's all automated."

For ongoing customer service, the Issuetrak Customer Care Manager uses the software in a way that doesn't fall into the usual categories. She contacts customers to identify their needs and determine their level of satisfaction, and deploys surveys via the Surveys module. Then she manages data collected from surveys, calls and site visits within Issuetrak, and coordinates action items and communicates status between the various Issuetrak departments.

"Issuetrak is such a powerful tool. It makes managing and coordinating large volumes of data a breeze. As a result, I have more time to actually address our customers' needs and look for trends," said Chris Thompson, Customer Care Manager.

## impacting every customer touchpoint

Finance handles both customer-facing and internal processes with a set of Quick Picks. Any billing inquiries that come in via phone or email from customers are assigned a ticket. As the staff processes the request, the customer receives automatic notifications. If the request needs attention from another department, when a question arises for the Sales team about licensing for example, the Finance staff can easily route those requests

to Sales Engineers and still follow them in the software.

Ultimately, having everything logged in Issuetrak prevents duplicate work and expedites requests.

"Before, three of us would get emails and phone calls and no one knew whether another person had already answered it," says Rosemary Milazzo, Controller. "Now we can quickly see who's handled the customer inquiry and how quickly. It makes a huge difference in response time."

Even teams you wouldn't expect rely on Issuetrak to ensure they never miss important steps in their processes. The IT department recently tracked everything related to a server migration. The Marketing department receives and processes requests from employees throughout the company regarding requested changes to the company website, and uses the software to check off all the steps of larger projects until completion.



## benefits

### *internal efficiency*

By automating processes throughout the organization, Issuetrak realizes immeasurable efficiency. Automatic Notifications to fellow employees ensure tasks get done – without the need to call, email or “pop in” to someone’s office with reminders or requests for an update.

### *better customer service*

Issuetrak’s widespread use of its own software extends to customers in multiple ways. Company departments that interface with customers, such as Sales, Support and Professional Services, remain on the same page about the status of customer issues.

But beyond that, everyone in the organization knows the software intimately. As a result, the Issuetrak staff brings customers that firsthand knowledge and fresh ideas on ways to use the software.

In fact, during sales-led demos or training, employees might take prospective customers to the Issuetrak Corporate site to show examples of their own usage.

“The fact that we use Issuetrak so extensively gives us great experience for customers who want to use it in various ways,” says Heather Webb, Product Specialist. “When training customers on the software, I can give real-world examples and offer nuances because I’m using it every day for business-critical tasks.”

### *a more sophisticated product*

Heavy daily use of its own software strengthens the product immensely. Across diverse departments and functions, Issuetrak team members relay their own feature requests and feedback to the development group, driving continuous improvement of the software.

For Steve Anderson, Business Development Partner, it all comes down to being proactive instead of reactive.

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*- Steve Anderson  
Business Development Partner Issuetrak*



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Luhring agrees. "Why are there fewer problems and emergencies around here? Issuetrak generates tasks, assigns them to right people, and they're as good as done," he adds.

## **about issuetrak**

Issuetrak, founded in 1992 and based in Norfolk, VA, is a global leader in providing software for tracking strategic business processes. First released in 2000, its signature software package has become a robust platform for internal and external customer service and support, IT help desk, workflow and process management, and issue tracking. More than 2,000 organizations in 35 countries, across a wide range of industries including financial services, high technology, education, and government currently use the web-based software. The company is a Microsoft Silver Partner and has been recognized with a number of awards, including the Inc 500, Inc 5000, and Deloitte Technology Fast 500.

