

## BakerRipley Manages Requests and Paperwork with Issuetrak

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*Jeanine Cepon-Geier, BakerRipley*

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BakerRipley is a Texas nonprofit organization focused on providing struggling communities with opportunities for success. The organization brings resources, education, and connection to over half a million low-income residents throughout the state every year. Their services include disaster recovery, career guidance, educational assistance, and much more. With over 70 offices offering various types of assistance to the local community, the organization requires a streamlined and organized workflow and a method for responding to issues promptly.

### **Business Challenge**

BakerRipley was using email, spreadsheets, fax machines, and sticky notes to manage paperwork and forms, as well as to track the progress of requests like work orders. However, employees soon found that their system was not an effective way to manage the large quantity of submissions from the organization's thousands of clients.

“There was no accountability,” said Jeanine Cepon-Geier, Business Process Analyst at BakerRipley. “We could receive a customer’s application and it could magically disappear.”

Customers were often left in the dark due to poor communication. The lack of visibility into the high volume of daily inquiries meant that correspondence frequently slipped through the cracks and requests often took a long time to process. With all of these problems slowing down workflow and causing roadblocks, the team decided to invest in a software solution.

### **Solution**

After considering a few other solutions, BakerRipley ultimately chose Issuetrak for their issue tracking and workflow needs. One major reason for their decision was Issuetrak’s ability to keep a timed log of actions on each individual issue, allowing stakeholders to easily see the speed of the process from creation to completion. Issuetrak also allows BakerRipley employees to run reports at the touch of a button -- a much easier process than manually aggregating the information.

Another important feature was the software’s Incoming Email function, which can grab information out of an employee’s inbox and populate an issue. Incoming Email eliminates the need to dig through emails to find a particular request. The feature also automates the issue creation process, saving employees time and fueling their productivity.



"Issuetrak has really created a great opportunity for our company to automate our workflow without the huge expense of an enterprise database system," said Cepon-Geier.

## **Benefits**

With Issuetrak in place to help manage workflow, BakerRipley is running more efficiently than ever before. Configuring the software to the organization's specifications was a short, intuitive process, and teaching employees how to use it was just as simple -- most staff took only an hour to learn the basics. After the initial training they could easily reach out to the Issuetrak Support team with any questions or concerns.

With the software set up and the staff trained, BakerRipley began reaping the benefits of a dedicated issue tracking software solution. In addition to saving hours of time through Issuetrak's workflow automation features like automatic assignment of issues and tasks and email notifications and alerts, the team's ability to communicate with and respond to customers increased majorly. With instant updates sent every step of the way and an easy method for adding notes and attachments to each issue in place, customers now know exactly where their request sits on the completion line.

Overall, the switch from spreadsheets and emails to Issuetrak has been a majorly positive experience for BakerRipley. They have even identified a few ways in which their usage of Issuetrak could be expanded to other departments, creating new opportunities to maximize efficiency throughout the entire organization.

