

## The Vantra Group

### ServiceWise Enables Both Internal and External Support Processes with its Powerful and Configurable Design

#### About The Vantra Group

The Vantra Group is a leading provider of Internet-based brokerage solutions. The company's depth of expertise and product flexibility enables financial institutions to get to market quickly in the most demanding area of online transactions – investments. With market-leading Internet software applications and a commitment to superior customer service, Vantra has helped a wide range of financial institutions grow their customer relationships and compete more effectively in an increasingly competitive and complex brokerage environment. The Vantra Group currently has a customer support team of 71 employees.

#### The Vantra Group Chooses ServiceWise as its Customer Support Solution

Prior to ServiceWise, Vantra was using Blue Ocean's TrackIt! as its internal help desk solution. While TrackIt! handled basic requests quite well, it lacked the workflow capability Vantra required and customization of fields was extremely difficult. Demetricus Mosley, Vantra's Network Administrator, said, "We were ready to roll out to our external

customers and TrackIt! didn't have all the features we required."

Vantra's search for a powerful support solution included TechExcel, Network Associates, PeopleSoft, and a few others. Vantra was introduced to ServiceWise through a PCWeek shoot-out comparison against two other help desk solutions. Vantra contacted each vendor, evaluated each product, and had each company provide a live demonstration. According to Mosley, the other vendors ran into difficulty when asked to change a field name or modify a setting. "When we asked TechExcel to add new fields and to make some modifications, they were able to do it quickly and on the fly," he explained. "When it came to ServiceWise, it was a simple product and it did everything we needed."

Ultimately, Vantra selected ServiceWise to handle both their internal and external customer support. Although some of the other products were competitive in terms of features, "The total cost of ownership of ServiceWise was its' biggest

advantage.” Because of the cumbersome nature of some of the other products, much of Mosley’s time would be required to simply maintain the system. Preferring ServiceWise’s ease of use and simplicity, he explained, “That’s time I just cannot spare.”

### **Easy and Intuitive Customization**

Initially, Mosley installed ServiceWise for the internal help desk. When they were ready to roll it out for production to external customers, they received some training from a TechExcel professional. After the initial training, he found that he was able to create new projects himself in less than a day. Mosley said, “Once we had the system installed, we tested it internally and worked out all of our procedural issues. We were able to roll it out to our customers in less than two weeks.” Mosley was pleased with the installation of ServiceWise because “it’s very customizable and you can modify fields quickly and create new projects in no time at all.”

### **ServiceWise in Action**

The Vantra Group initially implemented ServiceWise to handle incidents for their internal help desk. Eventually, they rolled it out to external customers as an external help desk. The workflow at Vantra is a bit unique – its structure is similar to that of the product development cycle.

When an incident is first submitted through ServiceWise, it is automatically sent to a programmer who does the initial coding. The programmer updates the ticket and changes the status, prompting it to be sent to the Quality Assurance (QA) project. The company is using ServiceWise as part of their software development cycle. Mosley explains that ServiceWise “acts as a policing agent – it helps to ensure that people are following established procedures.” The Vantra Group has also created a few special projects for the groups not involved in help desk or programming. Mosley explains how they use ServiceWise for administrative tasks also; “We have found it very beneficial to have a system where everyone has access and everyone can place

requests. With this tool, everyone has a ticket and a history is created for every request. It is very convenient for documenting purposes.” One of the greatest advantages of ServiceWise is that “it can be used for many things, not just for help desk. It’s a great tool – especially for new programmers and other new employees coming into an organization because it has a knowledge base,” explained Mosley.

### **Benefits**

“I would definitely recommend ServiceWise for any other company in a similar situation. When we started about two years ago, we were small and we didn’t have any set procedures. As the business grew, we reached a size where we really needed a tool to help us establish new procedures. ServiceWise played an integral role in helping us enforce those procedures.”

“ServiceWise is really easy, extremely customizable, and versatile. It helps management tremendously because of the customized reports. The reports are valuable in helping to evaluate how your business is performing and what types of problems and issues the company is experiencing.”