

Global Managed Service Provider

CSM + ITSM + IntegrationHub + SPM



Problem:

- A leading provider of NextGen managed services, struggled to...
- Model a representation of their customers digitally
- Visualize cost to deliver services to these customers
- Visualize revenues by customer by product
- Optimize their quote-to-cash prcesses to drive up margins
- Merger led to consolidating Connectwise & AutoTask



Solution:

- A customer-centric view of their service portfolio showing all customer entitlements and all related consumption of services
- Reporting that helps proactively understand impacted customers
- A CRM connected in real time, so that Agents and Salespeople understand the state of the account at any given time
- Connected ERP & Billing integrations to support Tier 0 deflection
- Configurable, automated invoicing so work-to-pay times are optimized



Customer Outcome:

- Improved customer experience, as workers can prioritize work based on account 'value'
- Line managers can improve gross margins via workforce management
- Executives have consolidated data sets to inform business decisions around costs, areas of growth, and the profitability of services
- Customers have a single point of contact for ALL Account inquiries regardless of fulfillment group, resulting in lowered total cost of service delivery



Differentiators:

- CSM Domain Separation
- Customer Project Mgmt
- Integrations: SFDC, Kaseya, MS Dynamics
- Custom CSM Portal
- CSDM Service Portfolio
- ITSM Integration



35%

deflection in customer self-service



25%

deprecation of homegrown solutions



20%

increased first call resolution

Service Delivery



339 new cases



63 Client responded cases

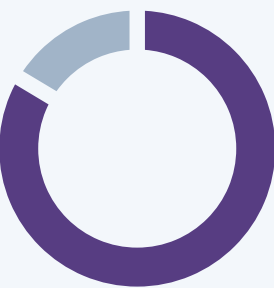


25 Open incidents



19 Open requests

Current cases by state



● New
● Client responded

Current cases by channel



● Web
● Phone

Current cases by CI



Current cases by user

