

# EnterpriseWizard Replaces RightNow® for Improved Functionality and Significant Cost Savings



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– Phil LeMaster, IT Operations Manager

## Business Overview

CSF International (CSFi) is recognized as a leading provider of ATM driving and management, electronic payment and transaction switching software worldwide. The company's software solutions provide services to hundreds of companies in over twenty countries, process millions of transactions every year, and support thousands of ATM and POS terminals worldwide. Clients range from de novo community banks to multi-bank holding companies and processing centers.

## Challenges

CSFi was using a variety of methods and systems to manage their business. Sales people tracked their leads and contact information in Excel spreadsheets; business support and operational data was held in libraries of Word documents; and license information was stored in a Microsoft Access database. They used Sharepoint for items needed and shared by multiple disciplines, such as project tracking and customer conversions. Lastly, they were using RightNow to handle all of the incoming support calls.

Recalls Philip LeMaster, IT Operations Manager, “Information seemed to be scattered everywhere. It wasn’t cohesive and it wasn’t being kept up to date. The sales, marketing, support and development departments each needed their own particular access to customer, contact, licensing and support ticket info, but without a coordinated system, data was often duplicated and out of sync.” It often took hours to obtain detailed information on nearly anything; at times they just looked through paper files rather than try to figure out how someone had stored information on their own personal system.

At first, CSFi only wanted to replace RightNow with a less expensive call center solution. “We were using RightNow web (a hosted service) and management wanted something in-house that was less expensive and could be managed internally,” said LeMaster. He supported the decision. “We had been dealing with an awkward interface and restrictive functionality for some time.” Key issues included having to go to RightNow to make even simple changes like adding Staff users; they couldn’t create Frequently

## Industry

Financial Services

## Challenges

Information scattered everywhere

Data stale and often duplicated

Call Center Solution challenges:

- Had to contact vendor for changes
- Fee for exports
- No customization
- Expensive annual contract

## EnterpriseWizard Solution

Customer Support

Project Management

Contract Management

Change Management

CRM— Sales Automation

Account Management

In-house Microsoft server solution

## Benefits

Huge Cost Savings

Faster Response to Tier One Customers

More User-Friendly

Improved Overall Efficiency

Better Reporting

Increased Sales Opportunities

Asked Questions (FAQ) pages; and exports had to be done through RightNow for a fee. Using a hosted service meant that there was no real customization available - they couldn't add fields to tables for a more accurate portrayal of their business model.

If CSFi was going to replace RightNow, they needed to do it fairly quickly before their support contract came up for its annual renewal.

## **The Search**

LeMaster reviewed five different products in looking for a flexible Windows-based customer support solution that could function well within a financial services environment. He also interviewed other companies to find out what they had done in similar instances. EnterpriseWizard stood out from the other products because it offered a complete package of applications, including Sales Automation and Contract Management as well as Customer Support, all of which could be customized to fit CSFi's financial business model without having to write any code. After a thorough testing of the trial database provided by EnterpriseWizard, LeMaster knew he had found the right product. "EnterpriseWizard had the improved functionality we needed, a better look and feel and the cost fit our budget: the purchase price was less than what we were paying for just one year of hosted service with RightNow." The big plus was that EnterpriseWizard also provided a way to tackle the even bigger issue of all those disparate systems, something that they hadn't even considered prior to starting their search.

## **EnterpriseWizard Solution**

CSFi's first use of EnterpriseWizard was to manage their customer support tickets. The actual time involved to convert the data from RightNow to EnterpriseWizard was minimal because of the knowledge gained during the trial phase. Testing out the solution took a few weeks more due to the complexity of the financial data. LeMaster also had to set up training for the staff so that they could learn the new system. Still, everything was up and running before the expiration of their support agreement with RightNow.

"EnterpriseWizard's pre-configured applications made it easy for us. We just took the support application out of the box and added our own customizations without having to write a line of code," said LeMaster. New fields were added to the basic Tickets and Companies tables to more accurately reflect the multi-tier aspect of their support offerings. They also added a fully integrated Frequently Asked Questions (FAQ) page so users could get answers to the most common questions involving the support system without having to send a separate email or try to reach someone on the phone.

They added additional support options for customers that have purchased 24 hour support. When a customer with 24-hour support creates a ticket after hours and reports that their system is down, an automatic text message is sent to the support staff and everyone in customer service is notified by email.

As one can imagine, the security of the data environment in a financial company is of upmost concern. Customers of CSFi include data centers that process multiple banks as well as the individual banks. In most cases, the data center creates the customer support ticket but the banks have the option to create support tickets themselves. When that happens, a copy of the support ticket is sent to the data center so they know that one of their customers is requesting help. Individual banks also have limited views of what they can see compared to the data center that can see more fields and tables. The same scenario applies to resellers which support multiple banks. The banks can submit support tickets and the reseller is notified of the ticket.

One of the CSFi's initial concerns in moving from a hosted to an in-house environment was how much work was going to be required to maintain the system. With EnterpriseWizard, the entire system can be backed up and re-installed within 90 minutes. CSFi now creates exports of their knowledgebase any time they please, without having to pay a separate fee. The EnterpriseWizard XML based export file format preserves all of the Contacts, Tables, Look & Feel, Customizations, Business Rules and scripts. Once an export is complete, they upgrade their installation by simply downloading the latest release and running the same program that they used to install it. It's just as easy to move the installation to a new system: they create an export of the knowledgebase, install the software on the new machine, and then import the database, all in under two hours.

## **Improved Business Functionality**

After the success of the initial customer support application, LeMaster's team decided to tackle the problem of duplicate and stale data by implementing additional EnterpriseWizard modules. They eliminated the sales data scattered about in spreadsheets, took all of the licensing information out of Microsoft Access, and discontinued the use of SharePoint. All of these data sources were incorporated into the same knowledgebase, with access to the information managed by permissions. Although this presented a much more complex use case, the implementation strategy remained the same – they took the default applications and customized them to fit their needs without writing any code.

"The financial services environment presents a complex use case scenario – we really pushed the envelope of what could be done," said LeMaster. "I really have to compliment the support staff at EnterpriseWizard. I dealt with the same engineer each time I needed assistance without having to explain our business model each time."

One addition was a new table called FDIC Summary of Deposits that has data from all of the US banks imported into it. The table is then linked to the Companies table so when a staff user looks at the Company record for a bank they also see the yearly deposits from the FDIC. Now they could easily see if any of their customers had increases in assets, and bill them accordingly.

CSFi also took advantage of the business rules engine within EnterpriseWizard to

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create rules that automatically check the License table five days before the end of the month, determine which customers' licenses are coming up for renewal, and then alert the sales team by creating a task in the Task table.

Another customization came from the sales team, who didn't like having Prospects and Opportunities in different sub-tables. These were combined into one table and new fields were added to give the team a more complete view of their sales targets. Adds LeMaster, "EnterpriseWizard is so flexible and adaptable, you're truly only limited by your imagination."

CSFi use of EnterpriseWizard now includes Customer Support, Project Management, Contract Management, Change Management, Sales Automation and Account Management. Exclaims LeMaster, "EnterpriseWizard far surpasses any competitor's system!"

## Benefits

**Huge Cost Savings** –The purchase price of EnterpriseWizard was less than one year of support with RightNow web, and annual support from EnterpriseWizard is equally affordable.

**Faster Response to Tier One Customers** – Texts and emails are automatically sent to the appropriate staff when customers with 24 hour support report down systems.

**More User-Friendly** – Interactive FAQ pages provide timely answers to customers without having them waste time making phone calls or sending emails.

**Improved Overall Efficiency** –Sales, Marketing, Support and Development personnel now work off one common database. No one wastes time looking through someone's individual data files to get the latest information on a particular person, bank or data center.

**Better Reporting** – Reports and dashboards are easily configured to provide up-to-date information on support tickets, sales opportunities and licensing details.

**Increased Sales Opportunities** –Sale people can now see if a bank has had an increase in assets over the previous year and bill them at the correct rate. License renewals are now handled more efficiently, with automatic reminders given a week in advance.

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## For More Information

Call 1-888-727-2209 ext 1 to learn more about improving your processes with EnterpriseWizard.

## About EnterpriseWizard

EnterpriseWizard, Inc. ([www.EnterpriseWizard.com](http://www.EnterpriseWizard.com)) is the leading provider of powerful, easy-to-deploy, and cost-effective Web-based software solutions for business process automation, customer support and service desk, and CRM for organizations with complex products or services. It has attracted hundreds of customers, ranging from startups to leading edge companies such as Chevron, NEC and Emerson Electric.

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