

## EnterpriseWizard Facilitates Task/Issue Resolution During Property Acquisition Process



"We've been looking for the right enterprise-level issue tracking system for several years. When we discovered EnterpriseWizard we were immediately attracted to their flexibility, configurability, and ease of use. We are very demanding customers because our diverse user community maintains and tracks issues on many projects with custom demands on almost every one. We have been able to tailor the user interfaces to the satisfaction of each customer group that we serve.

In EnterpriseWizard I am able to create entire custom tables and linkages between those tables during my lunch hour and not only does everything just work but the data is automatically actionable because these custom tables are live, with full workflow, business rules, reports, etc. As a Software developer/architect with 30 years of experience in the contact management/CRM landscape I am generally very guarded in my vendor evaluations. In the case of EnterpriseWizard I give resounding kudos and a firm endorsement."

Bob Kaplan  
Manager of Applications, Shorenstein Realty Services L.P.

### Business Overview

San Francisco-based Shorenstein Properties LLC ([www.shorenstein.com](http://www.shorenstein.com)) is one of the oldest and most successful private real estate investment companies active throughout the United States in the acquisition, development, ownership and management of office and mixed-use properties. They own and manage Class A Office Buildings all over the United States. In mid-March 2007, Shorenstein purchased 46 buildings in Portland and needed to integrate their information systems quickly to be ready for the company's May 2007 accounting cycle. They needed a system that would facilitate task/issue resolution throughout the strenuous acquisition process.

### Challenges

Shorenstein Realty Services L.P. required a system that would allow for the configuration of many distinct Help Desks, each of which could respond appropriately to different needs of the organization.

Issues needed to be sent automatically to the correct Help Desk based on complex routing rules, and each unit wanted to be able to customize forms and reports particular to their applications and business operations.

To ensure top-quality and consistent service, the system also needed to provide technicians with default solutions, and to automatically send customers email updates of their tickets.

### Industry

Real Estate Investment Firm

### Industry Challenges

Multiple Help Desk groups, each with different needs

Complex routing criteria

Data model must adapt to changing business needs

Need for improved communications with customers about the status of their requests

### EnterpriseWizard Solution

Adaptable BPA solution

Java™ Platform, Enterprise Edition

64 bit Windows OS

Single Sign-On integrated with MS Active Directory

### Solution Benefits

50% faster ticket resolution

80% reduction in number of phone support calls

Customized interface and reporting for each Help Desk unit

Improved customer satisfaction due to more frequent communications

Ability to share tickets between technicians

Re-use of best responses

Extensible to meet other business needs, such as managing the new hire process

## EnterpriseWizard Solution

Before putting EnterpriseWizard into production to manage their Help Desk activities, Shorenstein handled about 50% of its requests by phone and 50% by email. Since implementing EnterpriseWizard's Web-based BPA solution, over 90% of support requests are submitted to the new system directly, significantly reducing the phone support load.

Administrators are able to develop and maintain custom Help Desks suited to their particular needs. Each Help team has designed unique ticket input forms, including custom fields and custom views, and the drag-and-drop workflows and adaptable rules engine ensure that tickets are routed to the appropriate unit. The sophisticated report and dashboard generator provide custom views into each Help Desk's data. As teams request new features, administrators can rapidly adjust the necessary forms, rules and reports to meet the new demands.

Having ticket information located in one accessible place allows multiple technicians to collaborate on issues as the need arises, and the system makes it easy to mark solutions as standard responses so they can be re-used.

During the coming months, Shorenstein plans to expand the use of EnterpriseWizard beyond customer support to manage the workflow of its new user process. New users must be set up on anywhere from 6-12 applications, each of which is administered by separate groups. EnterpriseWizard's fine-grained security architecture makes it possible to set up custom group permissions and design workflows and rules that can handle this complex process. The rules will route the forms to all the necessary groups in parallel and send email notifications to the user and user's manager when the process has been completed.

Throughout their implementation, EnterpriseWizard's consulting team has worked closely with Shorenstein staff to ensure that the system works smoothly.

## Benefits

Using EnterpriseWizard to manage multiple concurrent Help Desks at Shorenstein has resulted in over 50% faster ticket resolution by:

Getting the issue to the relevant team more quickly because of EnterpriseWizard's routing rules,

Sharing the information among multiple team members who can handle the problem;

Enabling support teams to easily re-use solutions from previously resolved tickets. Customer satisfaction is significantly improved. They love the immediate e-mail notifications that the system delivers and the online FAQ knowledgebase that is available 24/7.

## 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 change management for organizations with complex products or services. Its flagship product, EnterpriseWizard, and its adaptable SaaS Wizard platform have attracted hundreds of customers, ranging from startups to leading edge companies such as Chevron, NEC and Fujitsu.

**"We want to thank EnterpriseWizard staff for treating Shorenstein Company as though we are their only customer. EnterpriseWizard has responded to all of our issues with a sense of urgency."**

— Bob Kaplan  
Manager of Applications  
Shorenstein Realty Services, L.P.

## For More Information

Contact 1-888-727-2209 ext 1 to learn more about using EnterpriseWizard to solve your business automation needs.

## Corporate Headquarters

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