bolstra

Good-bye, Trello;
Hello Robust Process Automation

*Worxtime Standardizes and Automates
Account Management Processes with Bolstra*

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Worxtime, an Equifax Company, is a compliance software solution provider that helps customers comply with the Affordable Care Act regulations. Customers subscribe to Worxtime's reporting and/or tracking solutions to ensure the accuracy and compliance of their payroll data. Prior to adopting Bolstra, Worxtime Account Managers (and most of the organization) documented customer interactions using

Trello. Adding Trello cards for every client created a veritable rolodex of cards that lacked automation or triggered activities. As a result, they had limited visibility into the work being done on each account, and they lacked a cohesive workflow. They needed a seamless account level view of all the pertinent information required to best serve their customers. **In adopting Bolstra, the Worxtime organization has been able to automate processes, standardize delivery, and begin to use the insights gained from the platform to balance account loads and capacity plan more efficiently.**

The Problem

Managing the success of your customers is virtually impossible when processes aren't automated or standardized

While each Worxtime customer is unique, they have all adopted the software for the same reason – to ensure compliance with ACA regulations. Managing customer accounts at Worxtime involves data scrutiny, and tracking and reporting facilitation. In an effort to ensure that all customer interactions were documented, the Worxtime data, client services, sales and account management teams were all using Trello to document their work.

The account management relationship is a high-touch one, which can lend itself to inconsistencies when not managed effectively. This also included logging all e-mails manually on Trello cards to document touchpoints. **While this process worked for documentation, it failed at process automation, and was time consuming.** The teams accrued voluminous activity comments within each client's Trello card with copious notes on each. Even though this provided complete histories of each account, it did not facilitate a standardized workflow, and did not automate any of the activities.

> *"With Trello, we were just adding notes on cards in an ad hoc fashion, without any triggered workflow. The reason we were looking to replace Trello was because we wanted a robust process automation system. We had so many recurring tasks that we knew could be automated, but just could not do in our existing system."*

— GAIL BRIGGS, WORXTIME SENIOR ACCOUNT MANAGER

The Solution

Delivering consistently excellent account management is best done with an automated work management platform that produces meaningful analytics that can be used to optimize processes.

With the goal of delivering the same quality of service to all of their customers, Worxtime adopted Bolstra. Every team member (Account Management, Client Services, Data, Finance/ Accounting, and Sales) who works with customers now uses the Bolstra platform. Workflow is defined using engagements and triggered activities. Team members know what they need to do for each customer and are able to document their activities and record their time.

> *I know what I need to do each day and am much better at managing my time. I no longer have to comb through Trello cards and identify my priorities. As a result, I've regained time in my day that I can use to perform account audits."*

— LINDSAY PAHMAN, WORXTIME CLIENT SERVICES REPRESENTATIVE

One tremendous improvement for the team is being able to use Bolstra's e-mail logging feature. Individuals no longer have to manually log each of their e-mail correspondences. This has given the team productive hours back each week.

With Bolstra, managers know what their team members are doing with and for each customer. This visibility into work provides the information needed to better define processes and balance the account loads of the team members.

> *Bolstra has given me a clear view into the work each team member is doing and how much time activities take them. I use this information to improve our delivery processes and capacity plan."*

— RICK LEPLEY, WORXTIME OPERATIONS MANAGER

The visibility into workflow and capacity that Bolstra provides optimizes account management efficiency, and allows management to focus strategically on growth opportunities.

With Bolstra, the Worxtime team enjoys greater clarity in workflow and in planning. Account Managers are gaining time back in their days by increasing their efficiency, and leadership is balancing account loads as they understand the work done as it relates to the value of the contracts.

> *E-mail logging has accelerated communication across departments. Before Bolstra, we had to log e-mails manually on Trello cards. Now that exchanges are automatically logged, anyone with access can catch up on client exchanges without having to wait for an Account Manager to review files and provide an update."*
>
> — GAIL BRIGGS, WORXTIME SENIOR ACCOUNT MANAGER

One example of this clarity came when Equifax acquired Worxtime in February of 2018. Subsequently, all customers had to be recontracted. With all contract data fully loaded into Bolstra, this process was streamlined. Renewal activities were all standardized and triggered so that those tasked with managing the renewal process had all the information at their disposal, as well as the defined process for executing. As a result, renewal steps were well-defined, time was saved, and opportunities for expansion were illuminated.

> *I wanted a [Customer Success] platform that would help my team be more consistent and streamlined in the way we managed our customers. As we increase our adoption, we only see greater value, especially in growing more efficient and productive. This will certainly free up more time and focus to be more strategic in identifying growth opportunities."*
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> — RICK LEPLEY, WORXTIME OPERATIONS MANAGER

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