bolstra

Good-bye, Trello;
Hello Robust Process Automation

*Worxtime Standardizes and Automates
Account Management Processes with Bolstra*

worxtime
An Equifax Company

Worxtime, an Equifax Company, is a compliance software solution provider that helps customers comply with the Affordable Care Act regulations. 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. They had limited visibility into the work being done on each account, lacked a cohesive workflow, and needed a seamless account level view of all the pertinent information required to best serve their customers. In adopting Bolstra, Worxtime 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.

The account management relationship at Worxtime is a high-touch one, involving data scrutiny, and tracking/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.

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."*
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> **— GAIL BRIGGS, WORXTIME SENIOR ACCOUNT MANAGER**

The Solution

Delivering consistently excellent account management is best done with a platform that manages workflows and produces meaningful analytics that can be used to optimize and scale processes.

With the goal of **delivering the same quality of service to all of their customers**, Worxtime adopted Bolstra for every team member who works with customers. 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."*
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> — 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.

The Value

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.

> *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. As we increase our adoption, we only see greater value, especially in becoming 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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