Agiloft

Shorenstein

REIT Realizes Massive Efficiences with Flexible Service Desk

Business Overview

San Francisco-based Shorenstein Properties LLC (www.shorenstein.com) is one of the oldest and most successful private real estate investment companies active throughout the United States. They are involved 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.

Challenges

In mid-March 2007, Shorenstein purchased 46 buildings in Portland and needed to integrate their information systems quickly to be ready for the May 2007 accounting cycle.

It needed a system that would do the following: task/issue resolution throughout the strenuous acquisition process; provide unique configuration to many distinct Help Desks, each of which could respond appropriately to different needs of the organization.

> "We want to thank Agiloft for treating Shorenstein Company as though we are their only customer. Agiloft has responded to all of our issues with a sense of urgency."
>
> — Bob Kaplan
> Manager of Applications
> Shorenstein Realty Services

They needed a system that would automatically send issues to the correct Help Desk based on complex routing rules.

Furthermore, each unit wanted to be able to customize forms and reports based on their applications and business operations. In order to ensure top-quality and consistent service, the system also needed to provide technicians with default solutions and automatically send customers email updates concerning their tickets.

Agiloft Solution

Shorenstein handled roughly 50% of Help Desk requests by phone and 50% by email. Since implementing Agiloft's Web-based BPA solution, customers now submit over 90% of support requests directly into the

Industry

• Real Estate Investment Firm

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

Agiloft Solution

• Adaptable BPA solution
• Java™ Platform, Enterprise Edition
• 64 bit Windows OS
• Single Sign-On integrated with MS Active Directory

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
• Meets other business needs, such as managing the new hire process

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system, 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 a unique ticket input form, including custom fields and custom views. For added security, the drag-and-drop workflows and adaptable rules engine ensure that tickets are routed to the appropriate unit, while 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 reuse them later.

During the coming months, Shorenstein plans to expand the use of Agiloft beyond customer support in order to manage the workflow of their new user process. New users must be set up on anywhere from 6-12 applications, each of which is administered by separate groups. Agiloft'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 the user's manager when the process has been completed.

Throughout the implementation, Agiloft's consulting team worked closely with Shorenstein staff to ensure the system worked as intended.

Benefits

Using Agiloft 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 Agiloft'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.

- In addition, customer satisfaction has improved significantly. They love the immediate e-mail notifications that the system delivers and the online FAQ knowledgebase that is available 24/7.

"In Agiloft, 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 Agiloft, I give resounding kudos and a firm endorsement."

— Bob Kaplan

About Agiloft, Inc.

Over 3 million users at organizations ranging from small enterprises to U.S government agencies and Fortune 100 companies depend on Agiloft's top rated product suites for Contract Management, Service Desk, Custom Workflow, and more. Agiloft specializes in automating processes that are too complex for competing vendors. Our best practice templates and adaptable technology ensure rapid deployment and a fully extensible system. For more information, visit https://www.agiloft.com.