



ConnectWise Case Study

ConnectWise PSA and Quosal Streamlines Procurement for IT Resource and Contributes to 28% Increase in Revenue

Company:

IT Resource

Business:

Managed services (MSP) and enterprise IT projects

Year Founded:

2000

Website:

www.itrw.net

Challenge:

To enhance and optimize scheduling and operations and create a more efficient quoting and procurement process

Solution:

ConnectWise PSA, with integration to Quosal for quoting and proposals

Results:

With ConnectWise PSA, IT Resource has served customers more efficiently, improved teamwork through an effortless workflow process, increased revenue, and created a more efficient and profitable procurement process.

IT Resource, Inc. is a premier end-to-end provider of information technology services and enterprise level consulting to Midwestern companies. Leo Reap founded the company in 2000 and rapid growth quickly created the need for a solution that could provide an end-to-end view of his entire business including CRM, inventory and invoicing.

"I found, at times, the left hand didn't know what the right hand was doing," recalls Reap. "We had a few situations where engineers would begin working on a project and then realize they didn't have something, creating a delay in service delivery to the customer. In an effort to make sure this type of thing never happened again, I needed to find a system that would streamline our entire workflow process, and that's where ConnectWise came in."

After comparing two solutions, Reap chose ConnectWise PSA, the leading business operating system for IT service providers, MSPs, technology consultants, integrators, and developers. ConnectWise fully integrates CRM, sales, help desk tickets, projects, managed services, SLAs, dispatching, time and expenses to streamline IT companies and help them become more accountable, operationally efficient and profitable. "The main reason I selected ConnectWise was that the product allows other vendors direct access to the ConnectWise APIs. ConnectWise works really hard with their third party partners such as Quosal and writing directly to the API makes perfect sense. It keeps it simple," says Reap.

Centralized dispatch and scheduling improves teamwork

Since implementing ConnectWise, IT Resource has dramatically increased efficiency and customer service levels. Reap notes, "Without a PSA, everybody is just scheduling their own time. ConnectWise has provided the most transparent view into everyday activities for every individual in the company. I can go to the dispatch portal and know instantly where everybody is, what they're doing, what's going on, and what tickets need to be assigned. We never had that before."



“Sales are up about 28% this year over last year. I know that a majority of it is due to ConnectWise and its vendor partners and the way we are more efficient with our time, billing, and customer service.”

“As many big projects as we have going on, that is one crucial part of making sure the project gets done on time,” Reap continues. “We’re not simply a help desk waiting for the phone to ring. We have a lot of senior and enterprise-level projects that we are working on and you’ve got to get those resources scheduled or you’re behind the eight ball from the start.”

Knowing what engineers are working on and how their time is scheduled has improved the level of customer service that IT Resource provides. “It’s improved our customer service ten-fold at least. If an engineer needs someone who specializes in Cisco, he can go to the dispatch portal and find out where our Cisco engineers are working. Teamwork and transparency to users have been the greatest things that ConnectWise has done for us.”

Streamlined processes create smoother operations and contributes to increased revenue

Now that Reap and his team can track and work on client projects from beginning to end in ConnectWise, it’s easier to stay productive and keep projects moving. Not only does that contribute to better teamwork and higher productivity, it also frees up time to recruit more clients without sacrificing any client service objectives. It’s an opportunity to earn additional revenue—and that’s just what IT Resource has accomplished, in spite of a lackluster economic environment.

“From a revenue standpoint, it’s hard to judge exactly how much revenue increase is just due to ConnectWise alone because we’re pretty busy,” Reap acknowledges. “We’re up about 28% this year over last year. I know that a majority of it is due to ConnectWise and the way we are more efficient with our time, billing, and customer service.”

ConnectWise and Quosal optimize the procurement process

Reap takes advantage of a ConnectWise support offering called ConnectWise TV to stay in the loop about relevant industry and product information. After watching an episode that featured ConnectWise Capital partner Quosal demonstrating how to use their sales quoting and proposal tool with ConnectWise, Reap realized there was a way to make the IT Resource procurement process run more efficiently. Prior to implementing Quosal, all quotes and purchases were completed on an individual basis, with quotes going out to customers in email, Word or Excel format and purchase orders created in QuickBooks. Accounting often didn’t know what price a customer was quoted and would have to ask the engineers how much to bill for software or hardware that had already been installed.

“It was an ‘after the fact’ and woefully inefficient process before Quosal,” Reap acknowledges. “But Quosal and



ConnectWise have streamlined our procurement process by 1,000%! Now, the engineer simply provides a bill of materials to the sales person, who creates a quote in Quosal, which in turn creates the opportunity in ConnectWise.”

This redesign of the procurement process is an example of how ConnectWise contributes to higher profitability at IT Resource. The sales process is improved, so more hardware and software can be sold to clients. The correct products get ordered the first time, saving time and frustration. And client billing is completely accurate, so IT Resource gets paid for all of the services and products they deliver. Reap is very pleased with the results. “Quosal, in conjunction with ConnectWise, has literally put hardware and software sales back in our business. We are so streamlined from quote to execution that hardware and software profitability is through the roof! Our sales staff has been able to create and deliver professional quotes while still on the phone with customers and the success rate is phenomenal.”

Active, knowledgeable partner community provides excellent resources

Reap appreciates the level of commitment that ConnectWise has demonstrated to its product and partners. In addition to keeping up with ConnectWise TV, Reap stays informed and remains active in the ConnectWise user community, especially the forums and user groups. “At the user groups, everybody is really friendly and they are all open. It’s not a stuffy competition. You have your own geography and customer base. No one is in the room to steal your customers,” he says.

Reap also likes the new shared templates feature on the ConnectWise Marketplace. It enables users to share customized templates with other users, such as email marketing templates. “People can pull templates into their ConnectWise and modify it for their own use. And it goes for e-mail templates or configuration templates, or work flow rules—there’s a whole host of things you can share out there. Why reinvent the wheel?”

When asked if he would recommend ConnectWise, Reap says, “I’ve been in business for 10 years and I’ve realized that if you don’t use ConnectWise, you’re just fumbling around. Take the time and use the resources available through ConnectWise and the community. They are more than happy to help. They understand the business and how it is supposed to work. They understand it from beginning to end. If you’re someone who doesn’t have a PSA, then use ConnectWise.”

ConnectWise PSA has done more than centralize business management for the team at IT Resource. It’s also helped them find the best ways to work together efficiently. By creating smooth, integrated processes that streamline every aspect of the business, ConnectWise helps IT Resource serve more clients without adding additional staff. Combined with outstanding products and service offerings, it’s a fast ride to higher revenues.

