A Customized Solution to Streamline Operations and Improve Efficiency

Challenge:

An existing BCS365 client who provides linen services to the hospitality industry was in need of a custom CRM ticketing process to automate their business operations which were being handled manually at the time. The new system needed to enable employees to enter and monitor incoming client tickets and prioritize them so they could meet delivery commitments. The available off-the-shelf applications either could not meet their needs or were too costly.

Background:

This commercial linen service has been providing quality laundry services to some of the finest resorts, hotels, restaurants and clubs since 1985. This family-owned business uses the latest equipment and top-notch customer service to ensure they are providing customers with the very best in linen services at a reasonable price.

The Client began working with BCS365 in 2012 when they were in the market for new surveillance cameras. They had recently relocated to a large facility and needed both internal and external cameras to monitor operations and increase security. They ended up installing approximately 30 cameras to accomplish their goals.

This initial project was only the beginning of the partnership between the Client and BCS365. They continued to work together to implement new servers, infrastructure, computers, and a phone system for the new facility. In addition, they engaged with BCS365 to provide fully-managed IT support.

Discovery:

In 2019, the Client was searching for an off-the-shelf CRM software they could use to more efficiently run their operations. However, the existing CRM products they were considering were either cost prohibitive or could not be tailored to meet their specific needs. They consulted with BCS365 who suggested SharePoint might be the best solution for what they were looking to accomplish. The Client worked directly with BCS365's Business Intelligence Developer who is an expert on how to leverage SharePoint to help businesses improve operations. During discovery, BCS365 learned it was critical that the solution work on mobile devices and that jobs could be prioritized as they came in.

Solution:

To solve for their challenge, BCS365 created a custom SharePoint site and messaging process to replace the Client's inefficient manual procedures, enabling employees to be notified of and monitor incoming ticket requests in real time. With no additional licensing costs, BCS365 was able to leverage their existing SharePoint application to create a fully-customized PowerApps application and workflow that automates and prioritizes (high, normal, low) incoming requests as needed. Some additional functionality include:

- A dedicated SharePoint site for staff to enter and monitor messaging system requests
- Assigned color alerting to indicate prioritization and quality assurance
- Custom SharePoint forms to provide support and maintenance for:
  - New and existing customers
  - New and existing vendors
- Site views accurately showing:
  - Open messages
  - Closed messages
  - Archived messages
- Custom workflows providing automated:
  - Email alerts
  - Messaging reassignment
  - Audit tracking
- Access from any endpoint (computer, tablet, phone)

In addition, the SharePoint site views show new open items with color alerts for priority level and ticket status – open versus completed. This system gives them the functionality to sort and schedule tickets based on status or priority. Plus, the tracking feature allows them to keep an audit trail, knowing who processed what order and when it was completed, helping ensure accountability.

Results:

Using SharePoint to build the solution, BCS365 was able to develop a custom application within a week that was far less expensive than off-the-shelf CRM products because the Client already had SharePoint, Power Automate and PowerApps as part of their Office365 subscription. This custom solution was able to solve for all facets of the Client's challenge at a fraction of the cost and implementation time.