

For Milliman's 18 Help Desks, Crow Canyon Software is Flexible, Efficient and....Fast!

Milliman is one of the world's largest providers of actuarial products and services. With offices in major cities around the globe, the company serves a wide spectrum of business, financial, government, union, education, and non-profit organizations.

Milliman prides itself on being a "bottom up" organization with each office run independently. This style of organization results in 18 help desks covering the many offices. These help desks serve a variety of needs, including typical office or practice-based support, facilities management, and tracking internal development.

Paul D. Shane, Director of IT, is in charge of supporting these help desks. He tells how Crow Canyon's Service Request was chosen to fit Milliman's support needs:

Lotus Notes served as the collaboration platform for Milliman for years. However, as corporate needs evolved, Notes was unable to deliver key features, such as document management. Milliman decided to move away from Notes in favor of the more extensive and flexible capabilities of Microsoft SharePoint.

The IT management team sought a Help Desk solution that would work with SharePoint and allow for a seamless transition from Lotus Notes for some 50 help desk administrators working in multiple help desks. Furthermore, thousands of end users expected to continue to submit their requests via email, rather than having to learn and navigate through a specialized interface. The solution would also need to be tailored to fit the needs of each of the 18 help desks. A one-size-fits-all approach would not work for Milliman.

"It actually didn't take very long to find Crow Canyon; and they basically met all our pre-requisites," says Paul. As a proof of concept, Milliman's team, with Crow Canyon's help, built a test site for Crow Canyon's Service Request for SharePoint application. This trial allowed the team to get a hands-on feel for the solution's power, efficiency, and flexibility.

Moreover, Paul was pleasantly surprised at the level and extent of customization that Crow Canyon included with the maintenance program. At one point, Paul and his team suggested the addition of a "Quick close" and "Quick assign" button to the SharePoint ribbon. Without any hesitation, the Crow Canyon team created the buttons. According to Paul, "I kept expecting a hefty bill for all the hours of professional services the Crow Canyon put in to really fine tune the help desk solution. I never received one; all the work was included as part of standard support!"

Upon cutover to Crow Canyon's Service Request, Milliman employees continued to submit their service requests through

email, just as they always had. Crow Canyon's solution proved completely transparent to the end users, doing all the heavy lifting on the back end. The Service Request software efficiently "reads" the email and populates key information on a new ticket as it automatically creates the ticket in the system. It also can be configured to auto-assign a service technician, based on criteria in the email.

Crow Canyon's Service Request program allows Milliman to accommodate the individual tastes of end users. Users can opt to view more or less information as to the status of their requests.

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"Some people want to know, every step of the way, what we're doing. So we can set the system to inform them at regular intervals," says Paul. The system uses customized alerts, including which technician is assigned to the ticket and what the status is. These notifications can be turned on and off as needed.

There is even a client-facing portal into which clients can go and see all open tickets for each group. But the Milliman team hasn't used it yet. Paul explains, "The email process runs so smoothly, we haven't had to. But it's good to know it's there if and when we need it."

The combination of a well-designed solution along with a highly professional and helpful staff provides the best of both worlds for Milliman. "The Crow Canyon team is smart, helpful and fast to respond to our questions," says Paul. "And, yet, the tools they provide with the system are so easy to use, so we can also make many of the changes ourselves."

At the end of the day, with Crow Canyon on the job, it doesn't matter if you are a developer tracking bugs and features, a facilities management team tackling building issues, or IT support crew running a support desk. As Paul puts it, "Crow Canyon enables flexibility to document support tasks and tickets, and doesn't slow down our support personnel with endless prompts and screen refreshes."

"And," he quickly adds, "the icing on the cake is Crow Canyon's super-responsive support team, which provides quick answers and fixes to any problems or issues that arise."

