



CASE STUDY

Administrative Service Provider TOTALadmin Uses Captaris Workflow to Turn 20 Years of Intellectual Property into Corporate Assets

TOTALadmin offers a business model of professional management, consulting services and products that incorporates an automated IT assessment model. The automation of this IT assessment reduces the time required to complete, analyze and present the findings and reduces the cost to the client without negatively impacting profit margin. Leveraging over 20 years of intellectual property by capturing that knowledge in automated workflows creates scalability supporting rapid business growth.

BUSINESS VALUE

BUSINESS VALUE FROM WORKFLOW SOLUTION	
Time to Complete Assessment Reduced	↓ 60%
Costs to Clients Reduced	↓ 50%
Scalability Increased	↑ 75%
Future Solution Development Efforts Reduced	↓ 80%

BACKGROUND

TOTALadmin's mission is to provide administrative support to the private enterprise market. With extensive knowledge of administration requirements *TOTALadmin* offers the services and products that are essential to the day-to-day administration of an organization. Growth for *TOTALadmin* is focused on expanding administrative management services to small, owner operated businesses. From financial management to human relations services, *TOTALadmin* provides their customers with a level of administrative support they might not otherwise be able to obtain or cost justify.

TOTALadmin was created by Cameron Management Service Group (CMSG) to focus on providing administrative support to the SME market space. CMSG has a 20-year history of providing consulting and administrative services, primarily in the legal market, including Firm Governance, Human Resources, Payroll and Accounting. CMSG's staffing division places permanent and temporary administrative staff with legal and professional firms.

TOTALadmin comprises a suite of managed administrative services and a degree of sophistication that is not otherwise available to small and medium businesses. Individual customer size and purchasing volume make it virtually impossible for individual clients to match or achieve the same level of domain expertise or cost savings as those available through the *TOTALadmin* alliance partners. All products are based on a high touch and high tech philosophy.

The *TOTALadmin* Product offerings include:

CONTRACT	CONNECT	COMPLETE
<ul style="list-style-type: none"> • Administrative Review • Technology Assessment • Cost Reduction Strategies • Staffing Solutions • Problem Solving 	<ul style="list-style-type: none"> • Operations • Benefits • Staffing • Procurement 	<ul style="list-style-type: none"> • Human Resources • Facilities • Accounting • Information Technology

THE CHALLENGE

One of the first areas *TOTALadmin* chose to automate through workflow was that of Information Technology. IT specialists within the administrative arena are a resource in very scarce supply. Those that possess that knowledge are hard to find and harder to keep. Successful delivery of the *TOTALadmin* methodology is dependent upon the team of people who understand the methodology, the nuances of particular industries, the customer's environment and the delivery of those services to the customers.

The *TOTALadmin* methodology transitions the customer through Discover, Design and Deliver stages. Each of the stages provides the customer with all of the information necessary to make the choice to proceed to the next stage. This ensures the customer is in control of the process at all times and costs are associated with the value received.

When the client begins the *TOTALadmin* Discover process, they provide information about their organization by answering a number of questions on culture, environment and their existing technology thereby creating a customer assessment. The knowledge regarding completing an assessment and producing a report based on the information gathered was the responsibility of a few highly trained individuals. This created not only a limiting factor on the expansion of the business, but a risk factor if this intellectual property was lost for any reason.

TOTALadmin determined that growth through increasing team resources would prove too costly, both in terms of training new resources and the time required to complete each individual assessment manually. If the business was to leverage the knowledge it possessed it would need to employ technology and create an environment for growth that worked for both the organization and those that possessed the knowledge.



"Captaris Workflow (previously known as Teemplate) has provided us with a competitive advantage by allowing us to capture our IP and utilize it in a profitable, scalable environment. We are now able to reduce our cost of performing each Discover engagement and increase the probability of future customer engagements. Not only does TOTALadmin benefit, but our customers also benefit from reduced costs and improved services." —Bob Brunt, VP Technology, *TOTALadmin*

THE SOLUTION

TOTALadmin selected Captaris Workflow as the workflow tool to implement its IT methodology and CORE Partners Inc. (CORE) for the development of the solution. CORE, a Captaris Certified Partner, provides a range of operational and strategic development services to companies who are evolving their businesses.

By using workflow to design, build and deliver its IT Methodology *TOTALadmin* is now able to provide a fully integrated and cost effective solution to its customers. *TOTALadmin* has expanded the previous manual IT methodology and enabled a revolutionary means of deployment through Captaris Workflow.

When a customer starts the assessment process in the Discover stage, the corporate information is captured from an existing CRM system or manually entered into the database triggering the initiation and tracking of the process for that customer. Each step of this automated process was developed based on the knowledge that the team at *TOTALadmin* has acquired over their 20 years of service.

The assessment of the customer environment has been designed to be an interactive exercise with the client. "Task Ownership" in the assessment automatically creates an email notifying the person responsible for the task and providing them the Web form used to gather the data. As data is entered into the Web form, it is captured

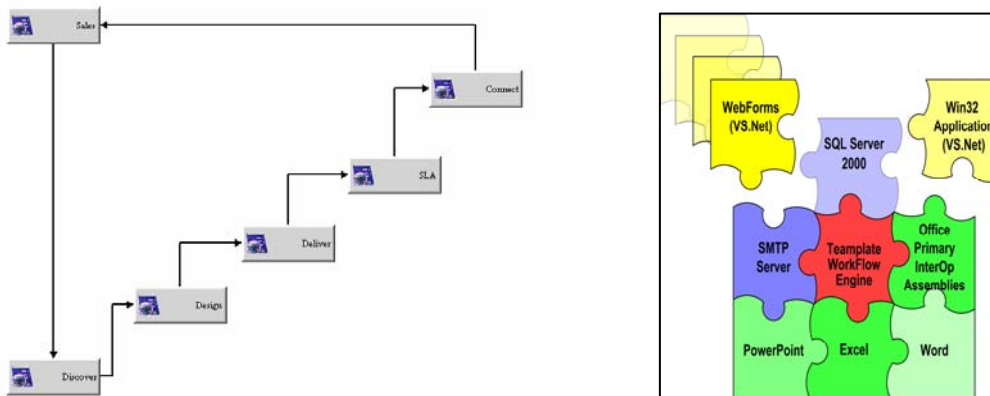
in the *TOTALadmin* database. This ensures that if there are any system problems during this stage, the work completed to that point is not lost. The data gathering process is accomplished online, ensuring that the data collected matches the standard structure and eliminating the need for data transfer or data re-entry. In addition, face-to-face meetings are not required and those providing the data may do so according to their own schedule. The data gathering process is now completed in approximately three to five days.

The system notifies the Discover project manager when all of the data for the analysis has been captured regardless of the number of people involved providing information. After reviewing the information, the project manager confirms that the automated process can begin the analysis. The automated process applies business rules against the data collected and provides the analysis in a Microsoft Excel spreadsheet with worksheets that create a Microsoft PowerPoint template ready for client presentation. This analysis and the creation of the PowerPoint presentation now takes less than an hour compared to the three to four days of effort required during the manual process.

TOTALadmin, within a two-week timeframe, can now collect the necessary data, complete an assessment of their customers' environments and create a presentation identifying the corporate risk areas. In addition to knowing the data analysis is completed correctly each time, the use of the PowerPoint presentation also ensures consistency for each client that progress through the Discover stage.

The automation of the assessment in the Discover stage including mapping the process details, development and implementation was completed in less than two months. When CORE started analyzing *TOTALadmin's* requirements, it was obvious that automating the process and incorporating the business rules as part of the solution, would be instrumental in achieving *TOTALadmin's* vision. As certification training was completed and planning the system requirements was underway, it became evident that developing a solution from a workflow perspective was a revolutionary way to construct the solution's foundation.

Once the team at CORE started to apply this insight, the development was completed in a relatively quick timeframe. Fundamental to the solution was the expert use of a number of Microsoft tools. The tight integration and seamless connection among the Microsoft tool sets was a major productivity boost for the development team. The application touches three of the four main Microsoft Office components, SQL Server 2000, Exchange 2000, ASPX pages and of course the Captaris Workflow engine, all from within the IDE of Captaris Workflow, powered by Teamplate and Visual Studio .NET.



Once the development team at CORE internalized this approach and leveraged their learning, the development of a second solution happened almost overnight. This second solution, a customer services desk which *TOTALadmin* believes is comparable to industry giants, was completed in only five days.

The benefits *TOTALadmin* receives by automating their IT Assessment with Captaris Workflow includes:

- The management team's 20 years of intellectual property has been captured as a corporate asset. This asset is leveraged by being applied in the process as business rules.
- Scalability was achieved.
 - The automated assessment provides for capture and analysis of the customer's information and the creation of a PowerPoint presentation, significantly reducing the manual effort previously required.
 - Resources have not increased.

- TOTALadmin can now perform multiple assessments in the time frame it previously took to complete one.
- When new resources are added to manage the growing business, they will be effective immediately because the solution guides everyone involved through the steps.
- The functionality of the solution incorporates customer interaction with TOTALadmin resources through the Internet at the appropriate time in the process.
- Optimization of the Microsoft standard environment and utilization of the Office platform.

THE RESULTS

The Captaris Workflow solution has delivered tremendous business value to *TOTALadmin*. The reality is that there is attrition through each stage of the transition phase. For a number of reasons *TOTALadmin* believes that approximately 70 percent of those who complete the Discover stage will move on to the Design stage. By leveraging its intellectual property, *TOTALadmin* is able to complete more Discover engagements and therefore prompt more Design and Deliver engagements. This value can be measured in four distinct areas: Effectiveness, Cost Reduction, Profitability and Scalability.

When CORE develops the additional sections of the Transition and Leverage phases, *TOTALadmin* will also benefit with a reduced development time schedule.

- Time To Complete Assessment - **Reduced 60 percent**
- Costs to Clients - **Reduced 50 percent**
- Scalability - **Increased 75 percent**
- Future Solution Development Efforts - **Reduced 80 percent**

FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit www.captaris.com or call 1.800.443.0806.

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