

CITINET SOLUTIONS | CUSTOMER SUCCESS STORY

Stress
Change
Finances

Balance
Training
Innovation



balancing life's issues
inc.

LOCATION:

Ossining, New York

BUSINESS:

Corporate training

CLIENTS:

Corporations, nonprofits,
schools and employee
assistance programs

A COMPANY THAT TEACHES CHANGE MANAGEMENT NEARLY HAD ITS OWN MELTDOWN OVER SOFTWARE

CHALLENGE

Help consultants worldwide instantly bill work hours; build a back-end system for tracking consulting assignments and payments, gathering feedback and generating customer invoices.

SOLUTION

Customized interactive portal for consultants that provided assignments, and collected hours-based invoices and customer feedback. Invoices generated in QuickBooks based on consulting hours and immediately sent to customers.

RESULTS

- 30 percent cash flow improvement
- 30 percent savings in staff hours
- 100 percent confidence increase in reconfigured system

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HOW BLI BOUNCED BACK FROM A DIGITAL DISASTER

Wendy Wollner's digital world imploded on a crisp spring day just north of New York City.

Her corporate training business – founded three decades ago with the mission to improve workplace efficiency, enhance productivity and increase morale – had failed her own team on all three counts.

Software incompatibility was at the core of the meltdown. But that wasn't a sufficient answer for her hundreds of customers, the 1,900 worldwide consultants who couldn't bill for their time, or her back office, which couldn't create invoices.

CREDIBILITY AT STAKE

"We were a minute from going back to paper," says Wendy, whose company does training programs for businesses, employee assistance programs, schools and nonprofits. Her consulting staff includes social workers, wellness coaches, registered dietitians, fitness instructors, CPAs, financial advisors and lawyers, among others.

The crash would be troubling for any company, but when your name is Balancing Life's Issues and you teach others how to manage stress, navigate organizational change and be effective in the workplace...well, you get the picture.

"I've never seen morale so low, and we have a very positive team," Wendy says.

Because she hires consultants via the Internet, Wendy is sensitive about how a breakdown could cause her experts to lose trust in BLI.

"Anything that destroys my credibility is devastating. Plus, these people have families and they depend on me to earn a living," she says. "I had to get this worked out fast."

CONFLICT AND LATENCY

Working out the problems had to start with identifying system weaknesses.

The FileMaker system Wendy bought from a big-name vendor was heavily customized, with features BLI didn't need but were guaranteed to create latency and conflict within the system.

On a good day, Wendy estimates, her team only was getting about 25 percent of the promised functionality. Then catastrophe struck.

"It didn't just crash for 1,900 people; it crashed in a way that couldn't be fixed. We were dead. It was demoralizing for the staff. When we got the vendor on the phone, I can't even tell you how unhelpful they were," she recalls. Wendy agreed to pay for a site visit.

"All they did was mess up and show they didn't know what they were doing. It totally killed the dream," she says.



DIFFICULT CHOICES

Wendy sought advice from peers. The resounding answer was, "Send those jokers packing." She did. But the next choice was even more challenging.

Should BLI try to salvage the system and see whether a different FileMaker development team could burnish the lump into a diamond? Or was it smarter to start over with different software?

She turned to trusted friends at the Business Council of Westchester, the widely respected economic development and business advocacy organization in suburban New York City. Citinet Solutions, Westchester County's first Apple authorized business agent and a FileMaker developer since 2004, was recommended.

The Citinet team persuaded Wendy that FileMaker could do everything BLI needed when properly implemented and stress-tested.

GETTING IT RIGHT

With some triage to keep the system functioning - repairing the consultant portal and integrating QuickBooks - the Citinet team looked deeper at potential solutions.

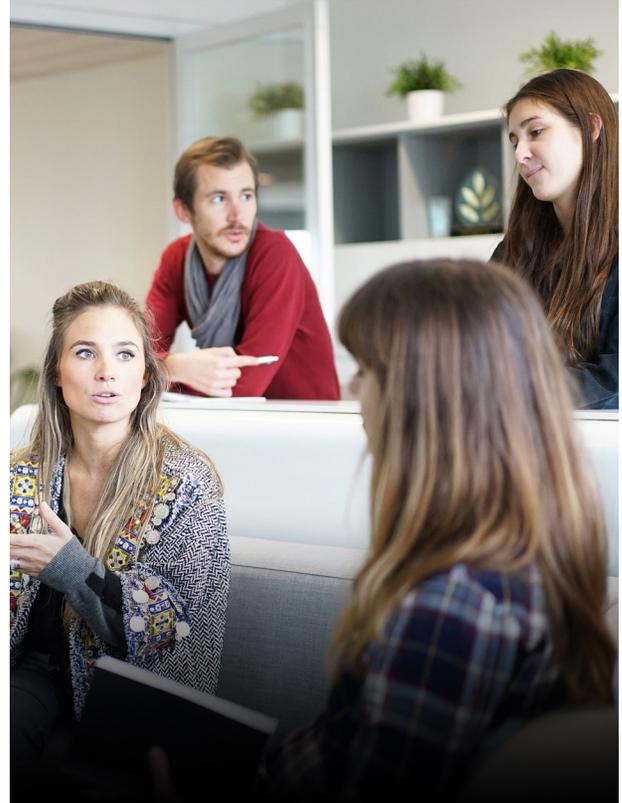
They essentially rebuilt the application, improving functionality, streamlining processes and testing integrations, affirming Wendy's choice to stay with FileMaker.

Working with another developer's code is often challenging. Just as we all have varying ways of verbalizing the same thought, developers can have unique coding patterns that don't always adhere to accepted standards.

The team debugged the code and assessed how each function interacted with other relationships. After completing its chief goal of improving user experience, the team added to the build.

Cinetin integrated an e-signature feature to make it easier for consultants to complete legal forms and an iPhone app so trainers can capture on-site training evaluation feedback. Other automations increased operational efficiency throughout the company.

Automated or manually triggered SMS texting is in the pipeline.



**“CITINET’S
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THEY LISTENED
AND GOT IT RIGHT
THE FIRST TIME.”**

–Wendy Wollner, President & CEO

CASH FLOW IMPROVES

With consultants back to reporting hours in real time, customer invoicing improved. Open receivables dropped from 37 days to 30, and the inside team was logging sales faster.

The ability for the training consultants to log in and bill hours improved "probably by 96 percent," Wendy thinks.

"Citinet's knowledge of our process and what we needed was amazing," she says. "They listened and got it right the first time."

'BACK TO THE DREAM'

Within a month, Citinet had FileMaker responding efficiently, and Wendy could go back to recruiting and business development.

"I went from having no belief that the system could work to, 'Wow, we can make it do 29 other things,'" she says.

Wendy thinks she has recaptured about 30 hours of her own time per month, simply because she is no longer pushing a vendor to fix a broken application and dealing with developers who don't seem to understand her needs.

Says Wendy: "We're back to the dream."



ABOUT CITINET SOLUTIONS:

Cinet Solutions was founded in 2004 as the first Apple Computer authorized business agent in Westchester County, New York, and the second in New York City. Since then we've grown exponentially in expertise and professionalism. We're happily independent with government clearance and employee-owned. Our specific skill-sets allow Citinet Solutions to tap into a suite of information technology support capabilities: from production, design and infrastructure, cyber security, innovative automation, and much more. We believe in hands-on only. No outsourcing. It's a model Citinet Solutions has maintained over the years to deliver the right solution at the right time for clients big or small.