

“How Autotask Saved My Business.”

IT BUSINESS ON THE BRINK

If you ask Eric Rivest what the biggest benefit he has experienced from implementing Autotask software is, he'll tell you in four words: "Autotask saved my business."

When he first told me this, I thought he was just being flip ... or kind. But he was dead serious. Eric is Vice President of Natrix, a growing, 6-person IT Service firm in Quebec. Here's his story:

"For our first few years of business we were only doing between \$600K-\$900K in billings, with 60-80 customers, mostly on the smaller side, with five to 10 workstations each. But, we soon began to grow significantly. Billings topped \$2 million, with around 200 customers of all sizes, some with 150 or more desktops."

Eric's growing firm was like a lot of small IT service companies, built through hard work, winning new clients one-at-a-time, running on cash generated from their work. They had a variety of tools to keep track of their work, their sales, their projects, and their billing ... but there was no true "system" in place. And, as Eric tells it, a lot of what they did was based more on what they "remembered" they had to do.

LOSING TRACK OF ISSUES LED TO LOSING CUSTOMERS

"We were starting to lose track of more and more things," he said. "That translated into serious lapses in customer service, which in turn started to result in customers actually leaving us."

Eric, who is primarily responsible for the company's sales, had tried to use Microsoft® CRM 3.0 to organize the business. He found that it was

sufficient for him to manage his sale pipeline, but he couldn't get anyone else in the company to adopt it.

"Not having the CRM directly tied to our billing system, our service tickets and projects, meant that nobody else would use the CRM either. So appointments were missed and to-dos didn't get done. It just wasn't working. That's when I realized we needed a single system to run our whole business. Autotask had everything we needed – and a lot more – at a very reasonable cost for a company our size."

“WE DON'T DROP ANY BALLS ANYMORE, PLAN & SIMPLE”

Natrix has been using Autotask for about 8 months now, and is still learning how rich the product is, and how many other ways they can use it to improve their efficiency. They're learning how to get even more work done without increasing staff, and boosting customer satisfaction at the same time.

"We don't drop any balls any more, plain and simple," said Eric. We're tracking all of our opportunities in Autotask, creating e-quotes, tracking it all in the CRM and generating to-dos to be sure we are following up. We're even synched up with my Outlook so my sales appointments in Autotask show up in my Outlook Calendar and my team always knows my schedule."

Erick said that while employees could get away with not adopting the old CRM system they had in place, using Autotask for everything is absolutely mandatory.

"It's very easy to enforce, he explained. "I simply tell my staff, 'If it's not in Autotask, I don't see it.'"

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Eric Rivest, Vice President of Natrix

