

## Flood & Peterson Insurance

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-Michelle Hoffert

With the Rocky Mountains as their backyard, employee-owned Flood & Peterson Insurance is one of the largest insurance brokers in Colorado. The company takes pride in the long-term business partnerships they've built with their customers, attributing their success to a practice they call “continuous” relationships.

This strong customer dedication isn't limited to Flood & Peterson's paying clients. Their IT team – led by Michelle Hoffert – shares a similar commitment towards the 120 employees they serve.

Hoffert says her small three-person department sincerely cares about their internal customers. But without a good tracking tool, ad hoc phone inquiries prevented them from working on the issues at hand. Because they didn't need some big multi-organizational system, they first settled for a basic tool that ultimately, fell short.

“We couldn't easily prioritize issues or assign tasks. And we couldn't link tasks together. Say for example, a printer malfunctions. We could have 10-15 tickets all related to this one printer, but with our original tool, these tickets couldn't be tied together. What we needed was something that was going to make our list of issues more manageable.”

### An Internet Search Uncovers an Unbiased Wealth of Information

Hoffert's team made a list of the top issues they wanted to address with a new system, and started their search. Like most people nowadays, they went online. But Hoffert admits she “struggled to find a resource that would point them in the right direction. Google is not always completely impartial, and it was hard to find local resources that didn't have a sales motive. We wanted to find a real, objective view.”

Their objective source was [Wikipedia](#). Here they found [a detailed, 12-point comparison of 35 issue tracking systems](#). Hoffert says they went down the list, selected products that matched their requirements, and began their hands-on evaluations.

### Task Management, Small Footprint Top Priorities

Their first priority was to find a tool that would allow them to effectively manage and prioritize all tasks associated with an issue.

“Sometimes a single issue needs several people – and several actions – to resolve it. A new tracking tool had to let us create sub-tasks, and assign each sub-task to the same or different people.”

The tool also needed to be lightweight and responsive. "Our first tracking tool was a real resource hog," says Hoffert. "You'd click 'open' and wait forever. The new tool needed to be a really thin install, and it had to perform. We felt that web-based was the way to go."

## Metrics, Flexibility and Price Tip the Scale in IssueTrak's Favor

IssueTrak and two other tools made their initial cut. One of the three quickly dropped out after Hoffert realized their tracking database could not be kept on their premises.

"It seems like every online application wants to charge you \$50 per user, per month, to maintain your data, and you don't even have 24x7 access to it. You have to go through them. IssueTrak gave us the option of keeping our data on our network, and didn't force us into a monthly maintenance agreement. We liked the fact that IssueTrak gave us a choice."

With the tracking database, Hoffert had to be able to extract the history of issues, and capture and report on key metrics such as "turnaround time" and "effort to resolve." "As technicians, we need to be able to quantify how much time we spend on an issue, and how long it takes," says Hoffert. "IssueTrak gives us everything we need. It automatically keeps track of time, and allows us to manually enter time worked. Other tools had this feature as well, but it was like pulling teeth to generate meaningful reports with their systems."

In the end, IssueTrak met 100% of their needs, and, at a quarter of the cost.

## Great Technical Support Offers Solutions, Best Practices

After an upgrade to their first tracking system failed, Hoffert said her team "didn't get the help they needed from the vendor's technical support."

IssueTrak was refreshingly different. "During our IssueTrak implementation we got great support. They helped resolve problems that were specific to quirks in our infrastructure, and they advised us on best practices. It's nice to know there's someone there we can talk to. They're going to be a great resource going forward."

## IssueTrak's Transparency Helps IT Team Provide Better Service

Just three months after testing a variety of scenarios and tailoring the tool to their organization, Flood & Peterson was ready for launch.

Hoffert sees great value in the transparency that IssueTrak's web-based interface offers. "Now users can track the progress of their issues online anytime. When you don't sit next to someone day in and day out, you don't really know how they spend their time. Giving our users the ability to log into the tracking system, see what issues are outstanding, and see current status is really useful. They'll know when we're conversing with a vendor, they'll see how much time we spend on each problem, and they'll know immediately when each issue is closed."

What's next? Flood & Peterson is eyeing IssueTrak for other departments. "Once we get rolling, there are a lot of possibilities for

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expansion. Accounting could use it to manage check requests, and building maintenance could use it as a driver for their work. The best part, Hoffert says, is that “people completing the tasks won’t even have to log into IssueTrak. They’ll be able to accomplish everything through e-mail.”

“Anyone who needs to track issues or requests can benefit from IssueTrak. If you know how to use e-mail, you can use IssueTrak.”

