

How the ConnectWise WP Integration Created Efficiencies for Sales and Operations at National Technology Management

ABOUT NATIONAL TECHNOLOGY MANAGEMENT



SAFESECURE VOICE & DATA

National Technology Management is a technology service provider that helps other Michigan-based businesses with technology issues. They also specialize in serving and supporting other MSP's and IT providers as a ConnectWise reseller and implementer.

WHAT THEY NEEDED THE CONNECTWISE WP PLUGIN SOLUTION TO DO FOR THEIR BUSINESS

National Technology Management (NTM) had a multiple challenges. They had an inefficient process of entering lead information and sales requests from forms on their website into ConnectWise. The team at NTM had no process, no workflow, and no automation behind getting information into ConnectWise from Gravity Forms. The team at NTM tried every channel-based WordPress and ConnectWise integration solution, but were not satisfied with the results.

NTM engaged BNG Design to help them solve this integration issue through the ConnectWise WP Plugin. NTM Director of Business Process, Ryan Seymour, used his integration acumen to successfully implement this integration. Seymour previously working for seven years at ConnectWise where he led integration efforts and worked with their sales teams to manage and grow the business.

With the client base at NTM doubling within the last year, NTM needed a solution to accommodate their growing business. Their goal was to simplify the process of connecting their web assets and forms with ConnectWise. Unfortunately none of the tools were able to help NTM solve their main issue which was syncing data from form fields with ConnectWise and allowing them to manage it all accordingly.

WHAT THE CONNECTWISE WP PLUGIN DOES FOR THEIR BUSINESS

Prior to using the ConnectWise WP integration, customer data from forms on their website would get lost because there was no automation and a lack of communication

between the two platforms. "Before the integration, there was no process, no workflow, and no automation behind getting any of our lead information into ConnectWise from Gravity Forms," said Seymour.

National Technology Management utilizes the ConnectWise WP integration for multiple purposes. They use it for workstation ordering, they use it in their hiring and HR processes, and they've created efficiencies by removing manual tasks within the sales department.

With workstation ordering, the value happens when their customers can place orders on their website and these orders go directly into ConnectWise for follow up by the follow up sales team.

NTM also uses the integration when hiring new employees. The human resources team fills out a hidden form on their site which creates a ticket in ConnectWise. That trigger allows the HR team to set up a new team member with their computer, establish login credentials on their user network, and set up their VoIP device.

The most impressive functionality of the integration is the time saved and efficiencies created through the removal of manual tasks and paperwork for the sales department. Because of the benefits of the integration, the creation of opportunities and sales activities in ConnectWise is unnecessary as it's all automated. Ryan and his team know of sales opportunities, immediately, and can assign the appropriate team members for follow up.

WHY THEY WOULD RECOMMEND BNG DESIGN'S CONNECTWISE WORDPRESS INTEGRATION



"When my sales guys are out in the field and their sales opportunity uses the form, they come back to the office an hour later and I already have their order processing, and have their project spun up. Keeping our sales people happy and operations running smoothly. Our system works, and they go out and sell. I figure the fewer things that I have to ask a sales guy to do that's administrative, the more sales he's going to make."

- Ryan Seymour, Director of Business Process at National Technology Management.