

### BENEFIT HIGHLIGHTS

- Reduced annual maintenance costs by 84%
- Reduced new hardware and software license costs by over \$2 million
- Improved efficiency an estimated 330 support hours per month using the employee web portal
- Reduced number of help desk system administrators by 75%
- Project stayed within schedule, within budget, and ended on time as planned

### COMPANY PROFILE



The First American Corporation

Title Insurance, Financial Services, and Information Services

31,000+ employees

1,000 support members

4% employee growth rate in 2004

\$6.7+ billion annual revenues in 2004

## Increased Productivity, Decreased Cost, Happier Employees: First American Meets Its Goals with TechExcel HelpDesk

### BUSINESS CHALLENGE

Replace existing help desk software because of poor performance and an unresponsive vendor. The new software needed to be easier to use, require less administration, and cut costs. Most importantly, the new software needed to support the informational needs of managers and support staff without requiring them to learn any new technical skills.

### OVERVIEW

Executives at First American realized that they were spending an enormous amount of time and money maintaining help desk software that didn't meet end-user needs or provide the business reporting they needed. Frustrated, they took their concerns to the software vendor. The relationship eventually soured, and First American began looking for another supplier for the company-wide help desk software.

"The cost of keeping that system going was tremendous. The hardware, the software, the consulting...we were locked in," said Dennis Gartin, Senior Vice President of Web Development and Business Application Support at First American Real Estate Information Services. The system's exorbitant costs were a concern, and First American Title did not want to continue to pay for a system that their end users were not comfortable with, and thus, did not provide a return.

Many of the end users and managers complained that the system was difficult to use and did not really provide them the functionality they needed. The data they collected was not easily accessible, which frustrated employees. "The reporting for our group was terrible," said Holly Myers, Director of Support Services. "Users could not customize their own reporting easily- to do so required extensive technical knowledge." Creating new reports or making basic changes to the system required the help of outside consultants. Over time, more and more changes had to be made to the system, and consulting costs became high.

## **TECHEXCEL SOLUTIONS**

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- TechExcel HelpDesk software with Employee Web Portal
- AssetWise Module for asset tracking
- FormWise module for easy creation and tracking of Web-based user feedback forms.

The work required to make these changes frustrated both support team members and managers.

Furthermore, these customizations caused an unexpected- and very serious- side effect; the extensively customized system could not be upgraded easily. Customizations were programmed into the system, so upgrading to a newer version required these changes to be re-programmed by specialists and developers, who charged large fees and could not guarantee the upgrade would function as needed.

First American management confronted the software vendor on the difficulties of upgrading. The vendor was uncooperative and insisted that they purchase additional upgrade services and newer modules. "There were some disagreements," said Dennis Gartin, "and many of us felt they were no longer customer-oriented, that they were only interested in selling more modules." Understandably, First American management was not pleased.

Vendor relationships are a top concern for many executives and CIOs. Today, particularly in the software industry, company consolidations, mergers, and a continual change of focus leave customers guessing, and oftentimes even stranded. But TechExcel prides itself on customer service, responsiveness, and superior account management, and proved to be exactly the solution First American was looking for.

According to David Sheahan, Product Manager, and project manager for the TechExcel deployment, "TechExcel was very accessible, open to communication, and immediately responsive to our needs. For a company as demanding as ours, the relationship we built with TechExcel employees was a large part of the overall project success."

## **THE INITIATIVE**

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There was a clear need to replace the existing system. First American formed a committee to evaluate project requirements and manage the conversion process. The committee was responsible for rigorously tracking the project, from vendor selection to implementation. Finally, the committee would perform a post-implementation analysis.

First, the committee focused on the most crucial features of the replacement software. The program should include reporting and analytics, simple interfaces for users, offer an employee portal to support the 31,000+ employees, and be less costly to buy and maintain than the previous system. The vendor list was narrowed to:

- TechExcel HelpDesk
- Heat

“The ease-of-use and user's ability to learn the software quickly made this product very attractive to us”

**Terry Griffith**

Manager, First American Support Center

- Track-It
- Restructure current Siebel implementation
- Microsoft CRM
- PeopleSoft
- Remedy

Holly Myers pointed out that “evaluating the software packages was a tremendously thorough process. We were in charge of making sure everyone got what they wanted. Every time we reviewed our options, TechExcel always came out on top.” TechExcel's HelpDesk application is unique in the industry, offering a combination of intuitive interfaces, sustainable performance, and total customizability for a reasonable price.

The committee, a group of First American managers, users, and executives from various departments, reviewed the software based on the needs of their own departments. In the end, committee members were surprised to see they had all reached the same conclusion independently: TechExcel's HelpDesk software was a best fit for their needs. Each department reviewed the software based on different criteria and the main concerns for each department are described below.

### **SUPPORT SERVICES DEPARTMENT**

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The First American support team receives an average of 20,000 incidents per month. Due to the nature of the business, many of these incidents are critical and need to be resolved very quickly. The high volume of incidents, combined with the large number of critical issues, require the support team to be very responsive. In order to be capable of responding to this demand, the First American support team must be able to rely on stable, fast software. Speed was a major concern to the support team, and their current system was already suffering with stability and performance issues. Project implementation time was another primary concern.

TechExcel HelpDesk addressed these concerns. The implementation was done very quickly, and support users immediately began using the new software. The intuitive interfaces resulted in a low-learning curve and high user acceptance. Since implementing TechExcel's HelpDesk software, the First American support staff has been very pleased with the performance and reliability of the system. The HelpDesk Web based client is 10 to 15 times faster than the previous software client. In the first 9 months, 200,000 incidents were submitted. First American has yet to have a performance or stability issue while using TechExcel HelpDesk.

“The ease-of-use and user's ability to learn the software quickly made this product very attractive to us,” said Terry Griffith, Manager of First American's Support Center. Griffith was accustomed to having very little control over the configuration and management of help desk software, as

“By providing a portal for an unlimited number of employees for no additional cost, we were able go from 990 users to over 22,000 users - and more users are added daily.”

**David Sheahan**  
Product Manager,  
First American

his previous experience had been decisively negative. Any change required a consultant or customization, which required custom programming, testing, and recompilation of the system. The process was cumbersome, especially given that First American's constant growth required frequent changes to the system.

TechExcel HelpDesk gives Griffith the ability to manage support projects using a simple administrative client. Now, Griffith has access to project administrative tools, allowing him to take control of his projects. The software also enables him to easily create new business groups and sub-projects on his own, without hiring consultant or using IT resources as First American acquires new business units.

### **END USERS - EMPLOYEE PORTAL**

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First American employees are located throughout the United States and Canada. With a family of 38 companies, each with groups and subsidiaries, the employees of First American use a wide range of applications that need to be supported. In addition, a large part of the employee user base is non-technical. A simple, self-explanatory employee web portal was a necessary requirement of any new help desk software.

Included with TechExcel HelpDesk is an employee portal for an unlimited number of supported employees. Many help desk software vendors charge extra for the portal, or license the web portal based on the number of employees supported. At First American, there are nearly 40,000 total employee records in the database, and over 22,000 have registered to activate their account and started logging tickets. Licensing each employee was not an option. “The TechExcel Employee Web Portal was a compelling selling point for us,” said David Sheahan, Product Manager at First American. “By providing a portal for an unlimited number of employees for no additional cost, we were able go from 990 users to over 22,000 users— and more users are added daily. The portal saved us a tremendous amount in licensing and users are very comfortable with the interface.”

To represent the complexity of the company hierarchy while simplifying the portal for First American employees, TechExcel has unique submission templates that are available to a specific group of employees. The templates simplify input, and ensure that the employee is only allowed to choose data relevant to their group. The submission templates also ensure that the technical support team receives clear and correct information. Working with the TechExcel HelpDesk system has increased the quality of data, the number of follow-up calls needed to complete a task has declined, and calls are now only necessary in order to clarify an incident description or to gather a vital piece of missing information.

## CUSTOMER SUCCESS STORY

Prior to using the portal, the First American support team would receive email submissions as tickets. These tickets would be manually processed, categorized, and assigned, taking an average of four minutes per email. Typically, support received 5,000 emails per month. Using TechExcel HelpDesk, employees submit tickets directly through the portal, saving the support team 330 hours per month previously spent doing manual email processing- the equivalent of two full-time employees.

### **IT AND ADMINISTRATIVE**

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The IT committee members were responsible for reviewing TechExcel HelpDesk from a technical standpoint. Hardware, integration with existing systems, administrative duties, complexity, and implementation process were all considered.

“First and foremost, this product simplified everything,” said Jack Toth, former Siebel manager. After implementing TechExcel HelpDesk, the number of full-time administrator/programmers needed to monitor the system went from four to one, allowing three programmers to be re-assigned to other projects. Completing any administrative task is simple using TechExcel HelpDesk. Administering the software requires no programming or consultants, and is done with a graphical administration client.

While the prior system was very flexible, customizations were completed by directly programming the application. The ability to program customizations gave the IT staff a great deal of power- however, it also introduced a number of problems:

#### **PROBLEM 1: SPEED**

##### PREVIOUS SOFTWARE

Customizations needed to go through a complete migration process. Changes were documented, given to the administrators or programmers, coded, checked-in, re-compiled, tested, and released.

##### TECHEXCEL HELPDESK

Customizations are documented, given to administrators and changes are made and pushed to the end user in real time.

Customizations that previously took weeks or months are now done in real-time or over a weekend.

## **PROBLEM 2: UPGRADEABILITY**

### PREVIOUS SOFTWARE

Customizations to the system caused major problems in upgrades. Coding done in previous version would have to be re-done in newer versions. Implementing a new upgrade would take months, entail a risk, and was very expensive.

### TECHEXCEL HELPDESK

Customizations do not affect the database structure or code. TechExcel HelpDesk is always upgradeable. TechExcel updates can be done overnight or on a weekend.

Upgrading TechExcel is a simple procedure. TechExcel provides free upgrades as part of the maintenance plan.

## **PROBLEM 3: PERFORMANCE**

### PREVIOUS SOFTWARE

Over time, custom code included many checks and validations that affected performance of the system. Investigations into system instability pointed squarely at the system's over-customization.

### TECHEXCEL HELPDESK

The system is designed to allow customizations within the TechExcel HelpDesk framework usually without custom programming. If custom programming is required, it is done using an API or direct database access and kept outside of the application server program. There is no recompilation of the application server.

TechExcel is scalable and fast. Since TechExcel is configurable without custom programming, TechExcel remains fast throughout its lifetime.

The IT committee members were also concerned with integrating the help desk software with existing applications. TechExcel worked with the IT group to integrate HelpDesk with existing systems and to automate tasks, such as a nightly update of new employee records from the existing HR system.

TechExcel HelpDesk tracks asset and hardware requests through the FormWise and AssetWise modules. Using these modules, employees complete a simple, web-based form at the employee portal. This request is stored within the HelpDesk software and linked to the employee. Assets are also tracked, assigned ownership, or returned using the



## CUSTOMER SUCCESS STORY

“At First American, everything from parking spaces to hardware is tracked in HelpDesk.”

**Sammy Edwards**  
Senior TechExcel  
Specialist,  
First American

HelpDesk software with the AssetWise module, giving the IT professionals tight control over any assignable asset. According to Sammy Edwards, Senior TechExcel Specialist, “At First American, everything from parking spaces to hardware is tracked in HelpDesk.”

TechExcel was implemented on top-of-the-line hardware to ensure the best performance, but First American spent a mere 5% of previous installation costs when installing TechExcel, increasing the software's value to the company.

### **MANAGERIAL AND EXECUTIVE**

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Managers at First American were primarily concerned with reporting and functionality. Previously, reporting was very difficult and required extensive technical knowledge. Additionally, many reporting features did not exist, were available at additional costs, or would require further implementation planning.

TechExcel HelpDesk is a full-featured support system that includes all essential components in a single base package. Included in the price of HelpDesk are: a full knowledgebase, web and windows clients, powerful employee web portal for an unlimited number of employees, and a sophisticated reporting package.

Tech Excel HelpDesk includes scores of commonly used help desk reports, all of which can be customized. New reports can be created easily using a simple report wizard, and can be exported to a number of formats. HelpDesk also offers reports for more technical data, and Crystal Reports or Microsoft reporting services can be used with the HelpDesk data.

First American executives were concerned about the time and costs associated with installing new software. Previously, upgrades frequently resulted in millions of lost dollars and a considerable amount of time and labor. First American's old software was expensive to purchase, upgrade, and implement, and required costly hardware as well.

All departments agreed unanimously that TechExcel HelpDesk was the best fit. First American purchased and implemented TechExcel HelpDesk for the same price that the company spent on maintaining the previous software during a year. Hardware costs were low, and executives were confident in their decision to implement TechExcel.



## CUSTOMER SUCCESS STORY

“We diligently reviewed a number of help desk applications on the market, and we came to the conclusion that TechExcel HelpDesk was the best of breed; a year later, we still hold to that belief”

**David C. Yavorsky**

CIO of First American  
Mortgage Information  
Services.

### IMPLEMENTATION

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Advance planning and preparation eliminated much of the risk of implementing the new system at First American. David Sheahan, product manager, estimated the project times at:

- 75% business planning and technical planning
- 10% implementing
- 15% testing, and gathering user feedback

He added “Overall, this was a very successful project for two main reasons: Our own understanding of our business process, and TechExcel’s willingness to work with us in order to translate our process ideas into a physical system.”

The TechExcel HelpDesk implementation was one of the easiest large-scale software implementation that project managers at First American had experienced. A major reason for the success was attributed to communication between First American and TechExcel. “During the rollout, TechExcel was very accessible, open for communication and responsive to our needs. This helped minimize surprises,” explained Mr. Sheahan.

In a single month, the IT team configured the entire system and was ready for end-user testing. The actual implementation was done in phases over a three month period, as each division was trained and eventually equipped with TechExcel HelpDesk after a high degree of comfort had been reached. The simple administration offered by TechExcel HelpDesk was a primary reason for the short implementation time.

Analyzing user feedback during rollout is important when trying to gain user acceptance quickly. “One of the most impressive features of TechExcel HelpDesk is the ability to administer on-the-fly and push out changes to end users immediately,” said Sammy Edwards, currently the Sr. TechExcel Specialist. Sammy was able to react quickly to any necessary changes, but also able to sit down with managers and users to configure changes in real time, and produce results immediately.

### THE RESULTS

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“We diligently reviewed a number of help desk applications on the market, and we came to the conclusion that TechExcel HelpDesk was the best of breed; a year later, we still hold to that belief,” said David C. Yavorsky, CIO of First American Mortgage Information Services. A year after implementation, First American HelpDesk users are very happy, as



## CUSTOMER SUCCESS STORY

“I have never heard a bad thing said about the (HelpDesk) software or TechExcel. We can pretty much rely on that system to be up 100% of the time.”

**Dennis Gartin**

Senior Vice President of  
Web Development and  
Business Application  
Support at First American  
Real Estate Information  
Services

are executives. TechExcel HelpDesk is an affordable, yet highly configurable application that can scale to meet the needs of the most demanding enterprises.

“I have never heard a bad thing said about the (HelpDesk) software or TechExcel,” said Dennis Gartin, Senior Vice President of Web Development and Business Application Support at First American Real Estate Information Services. “We can pretty much rely on that system to be up 100% of the time.” Dennis and the IT group are very impressed with the performance and stability of HelpDesk. In addition, the time spent maintaining the system was drastically reduced.

First American estimates that by implementing TechExcel HelpDesk, it saved over \$2 million in upgrades and hardware costs, and \$500,000 annually on maintenance costs. In addition to hard costs, administrative and developer resources were also gained, as the program was less complicated and required only simple maintenance and customization. First American's IT staff is also relieved with the simple upgrade procedure, which eliminates the high risk that was associated with previous system upgrades.

TechExcel is committed to providing the highest-quality software for businesses of all sizes and aims to eliminate the complex installation, maintenance, and customization procedures that are inherent in so many solutions available today. TechExcel continues to experience tremendous growth as companies realize that powerful software does not have to be complicated. Companies using TechExcel software benefit from high performance and high customizability while enjoying low costs and simple administration.

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