CUSTOMER SUCCESS STORY

WIDS

Management, Customizations and Easy Data Access

WIDS

- Better management of consulting projects.

- Improvements with user productivity.

- Scale up and down as needed with cloud ERP.

- Efficiencies in managing client and consultant data.

- Easy to access data.

Licensing Options That Fit Your Needs!

The Worldwide Instructional Design System, better known as WIDS, works closely with its customers to design learner-centric curriculum and training for education, business and government organizations. WIDS is a division of the Wisconsin Technical College System Foundation, a Madison, Wisconsin based non-profit organization that is dedicated to the advancement of education through enhancing the quality of learning.

For the past six years, WIDS has utilized OnContact CRM software by WorkWise to help build their client relationships. Prior to finding WorkWise, WIDS struggled with a lack of software that provided them with specific management features, customizations and easy to access company data.

We spoke with the Director of WIDS, Leah Osborn, about their software challenges, what led WIDS to search for a new CRM provider and their overall thoughts on OnContact CRM.

Prior to utilizing OnContact CRM, WIDS struggled with using software that lacked capabilities for marketing and project management, specifically SOW (statement of work) customizations.

> **"No other product had the project management features that worked with our systems the way OnContact does."**
> Leah Osborn,
> Director

"We had been using a different system to manage client information, but it really didn't have the capabilities for project management that we needed, so it really was the project management part that pushed us to OnContact."

Once the issue proved to be too much for WIDS, Leah says that the search began to find a new software provider. During their search, WorkWise Software was recommended. They became interested in OnContact CRM software upon learning of its capabilities, many of which their previous

provider didn't have.

"No other product had the project management features that worked with our systems the way OnContact does," says Osborn.

A major pain point for WIDS was a lack of client relations management, which is important with a consulting business. They found that OnContact was able to address that specific concern, leading WIDS to make the decision to work with WorkWise.

> "OnContact created enormous efficiencies in managing client data, project data and consultant data related to consulting projects, software sales and marketing efforts."

Other additional features that OnContact provides, including the SOW and contract component, which they frequently use also made their decision an easier one to make.

"We use the Statement of Work, or SOW component to manage our consulting projects, the company and contact components to manage client communication, and the contract component to manage our client software licenses. We also use the opportunities component to manage potential new business."

According to Osborn, prior to the implementation process WIDS met with WorkWise to plan the implementation and its subsequent release, with WorkWise also providing support training. During implementation, Osborn mentions that there were no significant challenges that she and the WIDS team faced, but that both learning a new software and having new features to utilize was a hump that the WIDS team eventually worked through.

"It just takes a little while for people to get used to a new system and feel comfortable with how it works compared to an old system that they were more familiar with."

With an organization that focuses on consulting clients, it is imperative that the information they collect from their clients is stored in a safe space that is easy for users to access, which was another important feature WIDS needed. OnContact CRM offers network CRM security, which features built-in firewalls.

Since using OnContact, Leah has noticed positive changes within WIDS. She mentions seeing an uptick in productivity because of the easy access to data, which was originally a pain point prompting them to search for a new CRM provider.

"One of the big benefits is that data is readily accessible. I can look at a particular client and I can see what kinds of contracts or projects, products or services that we've provided them."

While WIDS relies on the SOW feature the most and credits easy to access data as a way to increase their productivity, there are other tools that they now use and have seen additional benefits with, including managing and organizing client data.

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In terms of OnContact CRM meeting the expectation of WIDS' users and helping to eliminate their pain points, Osborn replied with "definitely."

> It's very responsive, very customer focused, and they (WorkWise) always figure out a way to accomplish whatever we need to accomplish. I've been very happy."

"It really helps us stay on top of our projects and manage our clients and our staff workloads. It provides the kind of data and reports that we need to support our business."

Overall, WIDS experience with WorkWise consultants and the software itself has been a positive one.

"Everyone is very helpful, they always respond very quickly. The other thing that's nice, compared to some other companies that I've worked with, is that I know exactly who to contact. I can always call specific people and they respond quickly and address our concerns. It's very responsive, very customer focused, and they always figure out a way to accomplish whatever we need to accomplish. I've been very happy."