



InvGate  
Service Management

&

Peoples Bank



Case Study

Finances

# How Peoples Bank aligned 24 different departments using InvGate Service Management



23  
Branches



24  
Departments

# Figures achieved with InvGate

**75%**

increase in portal  
incident reporting

**47%**

improvement in user  
satisfaction on ticketing

**40.1%**

improvement in user  
satisfaction on reporting

## Challenges

- ✓ Peoples Bank needed to find a multi-tenant solution to service their 23 branches.
- ✓ They were on different instances with their previous IT vendor, which made routing and updating challenging.
- ✓ They were dealing with hesitancy from their user base due to low user satisfaction.
- ✓ There was low user adoption with the legacy solution.

## Objectives

- ✓ Achieve support synergy by consolidating their service process.
- ✓ Create thorough and detailed reports to get a clear picture of departmental performance.
- ✓ Increase the adoption of their service management tool.

## Actions

- ✓ Implementation of InvGate Service Management.

## Results

- ✓ 75% increase in portal incident reporting (i.e. there was a measurable increase in user adoption).
- ✓ 47% improvement in user satisfaction on ticketing.
- ✓ 40.1% improvement in user satisfaction on reporting.

Interview

# Megan Engels

IT Service Management  
Manager

## What motivated you to look for a new Service Management solution?

We had a couple problems we could document and track. We needed something that multiple departments would be able to easily digest so that we could use fewer products and, instead, present a “single pane of glass” to our user base.. Our legacy solution was not scalable at all. We had set it up with three different managers who each used it in different ways with nothing being streamlined or consistent. In addition, it was a nightmare to perform updates. We needed something that was delivered in a single instance, specifically for streamlining our updates.

We also had permission issues for both our HR and payroll teams. They didn't trust the privacy of their data in the system, so they stayed with their email inboxes and that had a negative impact on our user adoption goals. Additionally, we had an overarching issue with reporting not being usable or configurable for the stakeholders who were authorizing the budget for our legacy solution.

For us the most important thing was that multi-department variable, where you can all be on one system, with department specific access and visibility permissions. Since InvGate is permissions based, you can grant those permissions based on needs or based on access with the watchers and collaborators, so they're able to send those tickets across department lines.

That was something we couldn't do before. You had to re encapsulate that ticket and send it through an email to the correct service management. It was slow, and people didn't tend to use that feature. It caused a lot of issues.

## What was the selection process like?

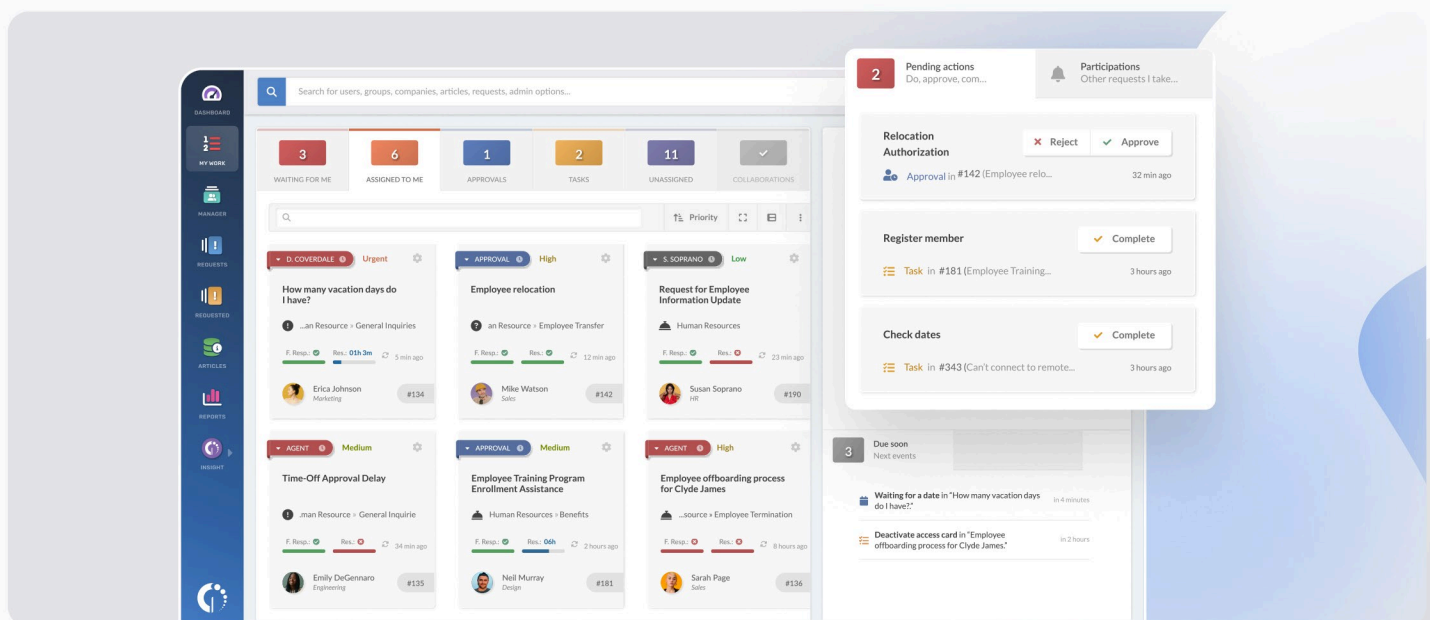
I was the leader of that one. I was determined that we were going to get a new service management. When you begin this adventure, you end up looking for a lot of different options online and there's usually a little video, and then of course inevitably there's a place where they get your information and pester you forever.

One of the places I asked for a demo was InvGate, and I met Shiraz. And Shiraz was wonderful. He wasn't "sales-y," and he really wanted to see me succeed regardless of the product I ended up with.

He showed me all around, he was familiar with our current service management, and he was so great and easy to talk to. I never felt like he was just trying to make a sale.

I walked away from that conversation and I looked at 20 other service managements. I did over 20 different vendor demos. I had a very in-depth spreadsheet and by the time I finished all of them I narrowed it down to 5 different options to take back to a team of 45 people to make that final decision.

InvGate was a clear choice for us. I always say it's not so much about the cost of the product, it's... "do I like the people? Can I work with them? Do I feel like I can call their support team? Can I get a real person? How many steps do I have to go through for support?" We stayed with our previous vendor for 13 years, there's a relationship piece that is absolutely so integral to how we do business, and we want that to be there for our vendors.





## **What have you been able to achieve since using InvGate Service Management?**

We have been able to essentially achieve support synergy. There is a single place to go, not 23 different email accounts, and we love the new portal experience. That is an absolute game changer. We are one full support department now, which is amazing, even though it's spanning so many groups and teams. It's one place to go for help. And from an end user perspective, that's just amazing.

One of the best feature improvements that we've had is the ability to report. Most of these teams that were working out of email boxes couldn't get any kind of metrics before. They had no way to streamline a process, they were doing it all out of a gut feel. As managers, we need tangible data to get a clear sense of how the department is working. So now I'm not responsible for looking for reports for people, they can do it for themselves. And to empower those managers to build those reports, it's huge.

## **How would you say the tool measures up to your initial expectations?**

I think Service Management overall has exceeded my expectations. It's almost like using an app sometimes you just click on it and you might have missed that there was a feature release out there, and all of a sudden you're saying "oh, it can do that? Oh, I can just drag and drop this?" As hard as you work on Service Management, it also gives back to you.

## **How has your experience been working with the InvGate team?**

It's been great. They always work with me. They always listen, no matter what I'm asking, they're always seeking to understand the motivation behind my ask. They're always so quick to say "hey, let's hop on a call and talk about this." Who does that? What support team is going to hop on a call that's outside your own organization to say "hey Megan, what do you really think about this?" or "hey, have you thought about it this way?" or "what are you trying to achieve?" Nobody does that. They've been fantastic.

## **How was your experience with user adoption?**

One of the reports you're able to build on Service Management is to see the method through which someone initiates a ticket. We began using Service Management in January of 2020 and we got people to go from 20% portal / 80% email to 95% portal 5% email. That took us about 6 months, but they really warmed up to it because once you build up that portal experience it's so seamless and such a better experience over email, there's no reason why you wouldn't want to use it.

It did take us a bit of time -- we had some user groups where that wasn't their first inclination, to go to another web portal. I did have a call one day where someone asked "you want me to use another portal?" and I said "no, this is a better portal," and I even got him to come over and use the new portal experience as well.

## What would you say to other businesses facing the same challenges as you were?

Do your due diligence. Take your personal journey to find the service desk that you believe will be the right fit for you. We did look at a couple free solutions. And free solutions are sort of like free apps. There's always some kind of in-app purchase or something you'll eventually hit your head upon, and with service desks it's very variable. It can be very low in cost or very high in cost. You really have to get in there and figure out the right fit for your

organization, and I truly believe it's very individualized. You really need to sit back, make your shopping list, and figure out what you need to be successful. And if you can avoid a product with a lot of extra layered fees, that's probably the best bet.

I can't express how pleased I am with InvGate. From sales to support, they're responsive, proactive, with updates and suggestions, and I really appreciate the clear vision that they have for the product. They will defend that product and the setup, but they'll also be very flexible when working with you to achieve a common goal.



**"We are one full support department now, which is amazing. Even though it's spanning so many groups and teams, InvGate Service Management is one place to go for help. And from an end user perspective, that's just amazing"**

Megan Engels  
IT Service Management Manager

## Recognized by the best in the industry

