



CASE STUDY



SOUTHWEST BANK'S "NO BRAINER" SOLUTION FOR TICKETING IN MICROSOFT TEAMS

SouthWest Bank is a leading financial institution offering commercial and consumer banking, wealth management and mortgage services to the communities of Odessa, Midland and Lubbock, Texas.

HQ: Odessa, TX

Company Size: 185

Agents: 33

Founded: 1999

Website: southwest.bank

Industry: Banking

Challenge

How to centralize support ticketing in Microsoft Teams to improve efficiency and align with their new Microsoft Viva corporate intranet.

Outcome

Improved efficiency in front office to back-office communication while increasing organization-wide Microsoft Teams adoption.

Corporate Intranet like "Cold Storage"

In March 2023, SouthWest Bank decided to revamp its outdated intranet portal, a crucial hub for employee resources.

"The old intranet system was something like cold storage, it became stale," said Kelvin Joseph, Information Security Officer at SouthWest Bank.

The bank gravitated towards Microsoft Viva due to its smooth integration with widely used Microsoft Teams. However, there was a gap: Viva lacked ticketing.

"The ticketing part was, I guess we'd call it a deal breaker," mentioned Kelvin, "if we didn't have a ticketing system, what's next for our intranet?"

Teams Ticketing: Build or Buy?

With time pressing and operational demands, developing an in-house ticketing system was off the table. The focus shifted to a Teams-specific solution offering a conversational approach that would align with their focus on Teams centralization.

The team set out with five key criteria in mind:

“Tikit helped us develop the solution a lot quicker than if we built it by ourselves, especially trying to incorporate Microsoft Teams.”

- Kelvin Joseph,
Information Security Officer
at SouthWest Bank

- 1. Swift Implementation:** Quick, hassle-free setup was vital due to the bank's daily time-sensitive transactions.
- 2. Seamless Microsoft Integration:** Their deep-seated Microsoft ecosystem, primarily Microsoft Teams, necessitated a fully compatible solution.
- 3. Ubiquitous Access:** Anywhere, anytime access was pivotal to maintain consistent business operations.
- 4. Efficient Resolution:** The demand for instant responses, particularly during customer interactions, called for a streamlined resolution process.
- 5. Scalability:** The solution needed to be flexible enough to cater to various departments.

Centralized Operations

Tikit emerged as the right fit for SouthWest Bank. Within its first year, it bolstered customer service, uplifted the employee experience and refined inter-departmental processes.

“ I like that it's all Microsoft, so it all works well together... We're able to have everything in one place. ”

- Demi Vargas,

Operations and Professional Development at SouthWest Bank

“It allows us to use AI to tackle repetitive tasks, letting us focus on other things,” said Kelvin.

Leveraging Microsoft's capabilities, Tikit delivered a refined ticketing experience in Microsoft Teams.

Tikit is able to provide new flexibility for work-from-home employees and positively impacts those that have to travel to branch locations as well.

“If I'm at a branch, I get notifications on my phone. It's just easy,” said Demi

A Partnership in Mutual Success

From their trial's inception, SouthWest Bank sensed the Tikit Team's dedication to mutual success. Free setup services and readily available support resources made implementation quick and easy.

“Support from the Tikit team is just incredible. I mean, I couldn't ask for a better company to work with. I've loved it.” -Demi

Addressing SouthWest Bank's key criteria:

- 1. Swift Implementation:** Rather than a time-consuming self-built solution, SouthWest Bank benefited from a system built by experts with a hands-on support approach.
- 2. Seamless Microsoft Integration:** With numerous Microsoft tools in their arsenal, the bank viewed Teams as pivotal.
- 3. Ubiquitous Access:** With a new system implemented in Teams, always-on service and flexible access are the new normal.
- 4. Efficient Resolution:** Tikit's seamless Teams integration ensures direct, swift interactions during pressing customer matters.
- 5. Scalability:** As SouthWest Bank envisions broader integration, Tikit's multi-department functionality means organization-wide adoption is now a possibility.

“By the time it came down to purchasing, it was a no brainer.” - Kelvin

Within a year, SouthWest Bank revamped its intranet and seamlessly integrated Tikit into their ticketing process. It streamlined operations, cutting down the need for custom development and elevated overall efficiency.

What's Next?

After seeing immediate improvements throughout the organization since implementing Tikit, the SouthWest Bank team plans to roll Tikit out to more departments including Loans, Mortgages and IT.

“Our ultimate goal is to help all departments work within one type of system, that being Microsoft Teams,” said Kelvin. .



Discover how [Tikit](#) can refine your organizational ticketing and service desk functions. Watch this [demo](#) video and experience Tikit with a [14-day free trial](#). Confident in Tikit's prowess, we offer complimentary setup to maximize your trial benefits. Schedule your [free setup call](#) now.