No-Code Service Management Platform Pays Dividends for Stockman Bank

TeamDynamix

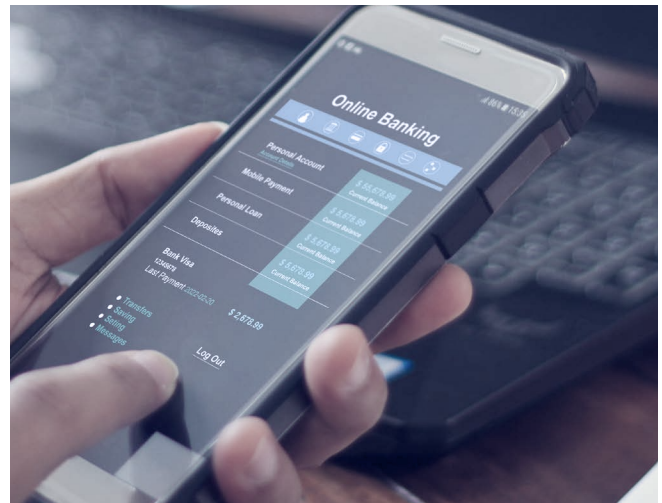# TeamDynamix offers Low Admin Overhead with Highly Flexible Automation and Integration

To stay competitive in rapidly evolving business climates, companies in all industries must be agile and highly responsive to their customers' needs, adapting quickly to meet changing circumstances.

Stockman Bank, a family-owned company that provides banking, insurance, and wealth management services for communities in Montana, recently switched ITSM platforms to do just that.

The financial services company made the move to TeamDynamix so that it could operate in a more flexible, nimble environment. Key factors driving this change included a need to be more efficient while also embracing automation.

Before TeamDynamix, Stockman Bank was using a large code-heavy platform that ultimately drained resources and budgets due to the system's complexity. As a result, even simple changes and integrations took several weeks and cost the company thousands of dollars.

"The learning curve for [the previous tool] was very steep," Tyler Kings, end user infrastructure manager for Stockman Bank, said. "We didn't have the time to really pick up all the nuances

of it and really figure it out, so we ended up hiring consultants to help us administer the system. That made the cost of deploying anything new within the system staggering."

With TeamDynamix, these changes now can be made in just minutes. Not only does this enable the company to be more nimble, but it's also resulted in significant cost savings – freeing up budget that can now be invested in other areas of the business to serve customers more effectively.

TeamDynamix is a highly customizable, no-code, easy-to-use ITSM platform that empowers organizations to build automated workflows quickly and efficiently using a simple, drag-and-drop process. It does not require any special knowledge of coding or scripting.

Fast Deployment of System Changes in Minutes, Not Days - Without a Dev Team

At Stockman Bank, a help desk team of nine technicians serves more than 900 total employees. While the previous ITSM system had a lot of features, building customized processes and workflows wasn't easy. It required a lot of coding, which chewed up a lot of time and money.

Outcomes

- ✓ **Flexible** change management
- ✓ **Better ROI** with easy to configure automation
- ✓ **Improved ability** to make changes and adapt without added cost

"TeamDynamix is a very powerful tool that we actually feel like we can use."

"The cost of deploying any new workflow or automation was so high, even for basic processes," Kings said.

As an example, Kings explained the company wanted to build a simple integration of its old IT Service Management platform with Microsoft Exchange so that it could monitor employees' in-boxes for incoming service requests. This project alone would have taken several days, if not weeks, to complete and would have cost nearly $50,000 to implement.

"We allot a certain number of hours for projects each month," he said. If projects take a lot of time to roll out, that means fewer projects and changes can be accomplished.

Kings and his colleagues realized this model wasn't sustainable. They wanted a service management platform they could administer themselves in-house, one that would allow them to make changes and build customized workflows in minutes rather than days.

"We talked to a reference customer during our evaluation process who also migrated off of the same tool to TeamDynamix," Kings said. "They shared with us that they moved from 5 people administering the platform for just one department, to 5 people managing TeamDynamix for 30 departments."

"TeamDynamix checked all the boxes for us," he continued.

Equipment Replacement Automation Made Easy

As soon as Stockman Bank began implementing TeamDynamix, the IT staff immediately noticed a big difference. They were able to create customized forms and automated workflows easily, which allowed them to streamline the delivery of IT services

without taking too much time or incurring additional expenses. The system was agile and flexible due to its efficient design.

"One of the first workflows we created was just a basic ordering system," Kings said. "When users order new equipment, it's now done through a single form on our service portal. They go through a series of check boxes, and based on what they select, the system automatically sends their request either to my endpoint specialist team or to the help desk."

The help desk takes care of keyboards, mice and other peripherals that don't need any setup or programming, Kings explained, and everything else goes through Kings' department. "We were able to make one simple form with that separation built into it," he noted.

And the integration with Microsoft Exchange that was a $50,000 project under the old system? Kings' team was able to accomplish that with TeamDynamix in a single afternoon.

Flexible Change Management

As a result of the switch to TeamDynamix, department managers have had to recalibrate their expectations for how much work their employees can achieve because of the efficiencies gained.

"When we built out our change management workflows, there was a piece that our manager for changes wanted to tweak," Kings recalled. "He asked if we could change that element by the end of the week. We had it fixed in just five minutes."

Making Enterprise Service a Reality

Stockman Bank's IT department has realized so many benefits from using TeamDynamix that they've spread the word to other departments.

"Because our license covers an unlimited number of users, we've expanded the use of TeamDynamix to areas like operations and facilities," Kings observed. The platform's flexibility enables it to be used in managing changes, projects and service requests within any business department, streamlining operations and freeing up staff to focus on more strategic tasks throughout the organization.

This flexibility even extended to rolling out the platform itself, where Kings and his team were paired with a TeamDynamix implementation specialist.

"I like to get rolling with things quickly," he explained. The implementation specialist adjusted the pace of the rollout to meet Kings' expectations. "TeamDynamix has been great to work with," he said. "They're very responsive."

With the help of TeamDynamix, Stockman Bank can be more responsive as well. The company now has a platform for managing and supporting changes and service requests that is just as powerful, yet much more user-friendly and affordable than the system it was using before, allowing the company to move quickly in response to rapidly evolving needs.

As for what the future holds, "We feel like the sky's the limit," Kings said. "TeamDynamix is a very powerful tool that we actually feel like we can use and get value out of. It's been great."

Saving Money With TeamDynamix

A critical integration with Microsoft Exchange cost $50,000 under the old ITSM system and was subsequently put on hold due to the cost. With TeamDynamix the integration was built in a single afternoon at no additional cost.

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