



Overview

Country
United States

Industry
Accounting and
Business Consulting

Customer Profile

As one of the top 20 accounting and business consulting firms in the United States, Wipfli has more than 100,000 clients, with over 2,400 associates in 48 offices across the United States and worldwide.

Challenges

- Wipfli was using a highly customized market-leading ITSM solution that could not easily and cost-effectively be upgraded and enhanced as they had to rely on outside expertise.
- Wanted to focus on the broader Microsoft platform for all business operations and align internal expertise with Microsoft technology.
- Finding an ITSM solution to support business critical and complex workflows as well as have PinkVerified® ITIL® processes.
- Reporting capabilities were cumbersome, time-consuming and lacked a consolidated view—frustrated team members often had to review several dashboards for related metrics.

Solution

Provance IT Service Management® powered by Microsoft Dynamics® 365

Results

- Highly experienced in Dynamics 365 and other Microsoft products, associates were able to quickly and efficiently adopt Provance ITSM.
- Able to efficiently leverage codeless configuration to easily implement advanced workflows and modify processes—utilizing current in-house skillsets.
- Simplified conversion process of incidents to service requests and vice-versa, reducing confusion and frustration among associates.
- Leveraged Provance ITSM dashboards and views as well as Power BI to put necessary information and metrics at the fingertips of individuals, improving reporting efficiency and decision making.
- Reduced costs by 30%.

Wipfli Calls the Shots and Simplifies Complexity with Provance ITSM

With over 100,000 clients and 48 offices around the United States and the world, Wipfli turned to Provance® IT Service Management and Microsoft Dynamics® 365 to leverage their skillsets and simplify service delivery.

“We knew our industry was transforming and our ability to change through technology would prove to be the key factor in allowing us to achieve our full potential. So, we embraced the Microsoft platform and identified Dynamics 365 as our most important business application.” – Michael Pynch, Partner at Wipfli

A Critical Stage

The relationship between Wipfli and Microsoft has evolved over the years into a tremendous partnership. As both an implementation partner and customer, Wipfli first deployed Microsoft CRM—the precursor to Dynamics 365—over 15 years ago, and they have continued to leverage Microsoft technologies ever since. Wipfli had not previously used Microsoft technologies to enable its IT Service Management or to serve its clients.

“About seven years ago, we chose to implement one of the market-leading ITSM solutions into our environment,” said Pynch, “but since that time, we began our digital transformation, and Microsoft and the Dynamics 365 platform became central to our strategy and our execution.”

Wipfli was at a crossroads. With this particular ITSM solution, they had spent quite a lot of money and time customizing the solution when it was first implemented and over time. Since then, the world had advanced, and Wipfli had outgrown the customizations and they needed to upgrade, but that meant incurring more costs.

“This ITSM solution had become, in fact, a technological outlier for us. We realized that we could put considerable effort and money into trying to make it work or we could choose a different path forward. Our search and a suggestion from Microsoft steered us towards Provance ITSM,” said Tom Lenz, IT Director of Wipfli.

Straight away Wipfli recognized that Provance ITSM came with all the advantages of Dynamics 365 and the Microsoft ecosystem, such as the Common Data Model and the integration with Office 365 and Microsoft Teams. And with Dynamics 365 capabilities underpinning Provance ITSM, Wipfli could advance their service management capabilities along with the platform, keeping pace with Microsoft's technological innovations and Wipfli's service delivery vision.

"We realized that Provance ITSM would help us maintain a high-level of service and functionality and by staying in the Microsoft ecosystem, we would now be able to advance our use of ITSM and ITAM without feeling like we were incurring greater technical debt. We know that Provance ITSM will catapult us forward and deliver an even greater experience to our associates," said Pynch.

Complexity Simplified

Since Wipfli had been utilizing Dynamics 365 since its first iteration as Microsoft CRM, they already had a vast pool of knowledge and experience internally that they could easily draw upon.

"As technologies advance and fade out of relevance, we could try to train individuals, and constantly select new software and shoot at moving targets, or we could benefit directly from the platform factor and using Microsoft integrated solutions, which would ultimately allow us to move more quickly and make safer decisions," said Pynch.

One feature Wipfli was particularly impressed by was the ability to configure and modify Provance ITSM without coding, which meant they could depend on their associates' skillsets and not have to rely on partners to make changes, including to workflows. Also, graphical interfaces make it easy to modify forms, fields, business process flows and automations.

"Since Provance ITSM was PinkVerified for ITIL® processes, there were already a lot of processes that we could leverage right out-of-the-box, but we had quite a few complex workflows that Provance ITSM needed to handle, including our onboarding, provisioning and deprovisioning processes, which had many complex layers," said Lenz. "Not only were we able to integrate Provance ITSM into our existing onboarding app, which launched the onboarding workflow, but Provance ITSM also allows us to see and make changes to the workflow, so we aren't dependent on their services when we want to change things."

Another process that was simplified was converting incidents to service requests and vice versa.

"In our previous ITSM solution, you had to close out the previous ticket, which caused confusion for associates as they received notifications that the incident or service request was being closed, when in fact, it wasn't," said Lenz. "Provance ITSM lets us easily convert, and associates can even see this process within the self-service portal. They understand we're still taking care of their issue. No more frustration. No more confusion. No more upset emails."

Provance ITSM also provides easily modifiable dashboards, views and reports, whether through Provance ITSM or through its integration to Power BI.

"The ability to build and share dashboards, custom views and reports is much easier within Provance ITSM than our previous ITSM solution," said Pynch. "Getting the right people exposed to the right information at the right time in their process has really helped us serve everyone across Wipfli much better."

All this simplifying of internal processes and tasks have led to a much more efficient use of people's time. But more than that, in terms of dollars and cents, Wipfli estimates that merely implementing Provance ITSM has reduced their costs by 30%.

Down the Road

Once Wipfli completed the first phase of implementing Provance ITSM, they saw results immediately. "Everyone in IT, and all our associates were able to adopt Provance ITSM without really missing a beat," said Lenz.

Which makes them quite excited to implement the next phase, including creating more workflows, deploying Provance IT Asset Management, executing skills-based routing and leveraging the built-in integration Provance ITSM has with Azure DevOps.

"The question that is always running in my mind is how do we make it as easy as possible to empower our associates to do their job. How do we make technology more of an enabler rather than just another thing I have to learn how to use in my day. Microsoft and Provance will be critical in driving us forward and ensuring everyone at Wipfli can operate at their best," said Pynch.