



Automate IT

How to supercharge ITSM and get time back in your day by automating mundane tasks.

PLAYBOOK

Includes 10 real-life stories of how IT leaders have made this a reality.





Enterprise Service Management, Automation Bring Efficiency & Consistency to **Casino Arizona and Talking Stick Resort**

“We looked at a number of systems. In TeamDynamix, we found the one that was most user-friendly.”

In addition, the platform’s enterprise Integration and automation capabilities allow IT staff to create customized integrations between TeamDynamix and other software programs using a simple, drag-and-drop flow builder. As a result, TeamDynamix customers can build workflows for automating almost any service function to fit their needs.

Finally, because TeamDynamix is easy to use and configure, it lends itself nicely to ESM and can be easily adopted by departments outside of IT.

Casino Arizona and Talking Stick Resort have doubled down on this approach to service by improving their ESM capabilities with the help of TeamDynamix, a cloud-based ESM platform. In looking for a new ESM platform, Casino Arizona and Talking Stick Resort wanted the ability to configure the system easily and make changes flexibly and dynamically. “We looked at a number of systems,” Dunn says. “In TeamDynamix, we found the one that was most user-friendly.”

With its “low-code, no-code” design, TeamDynamix is highly configurable, allowing organizations to create personalized service categories (both simple and complex) and build customized workflows for managing multistep processes.

Nutrabolt Automates Ticket Assignment, Creation of Accounts, Tracking and More

“We had a help desk tool in place, but it was not purposefully built,” explains Mark Dittenber, Director of IT at Nutrabolt. “It was very generic, and there was no discipline in the use of it.” Mark and his staff needed a highly flexible and customizable platform that could support new IT processes with automated workflows now, and into the future as the company’s IT operations continued to mature

“I liked the lightweight nature of TeamDynamix, as well as its ability to scale with our needs,” he observes. Mark and his Team were able to implement TeamDynamix in a matter of weeks. They began with IT service management and have now expanded to include project management. All the configurations and automation are created without any technical resources on a no-code platform.

Supercharged ITSM with Automation:

Within TeamDynamix, Mark and his Team established customized forms and automated workflows to create network accounts, assign rights and privileges to new teammates, submit and track service requests, request and approve IT changes, provision new devices, and more. As they create new IT processes from the ground up, they’re also building out a knowledge base and a self-service portal. Having thoughtfully crafted processes in place — and the right enterprise service platform to support them — has already made a big impact in just a few months. We really notice this when we onboard new teammates, they are ramping much faster.

Nutrabolt replaced Microsoft System Center Service Manager with TeamDynamix

“Before, handing off service requests from one IT Teammate to another was a manual process that involved multiple email exchanges. Now, those handoffs occur automatically within the platform. Our communication is better, and we’re missing fewer things.”

Mark Dittenber, Director of Information Technology

Covenant Health Drives Faster Response Time with Ticket Scorecards

One of the top issues reported by IT service management teams is they lack visibility into where anything is, and communication is lacking. Reports and dashboards are non-existent, or they take forever to run. That's why it's so important to have a highly configurable ITSM system with easy-to-build reporting (no technical resources required), custom dashboards and desktops.

Covenant Healthcare Drives Down Ticket Volume

Covenant HealthCare knew their IT department needed a better way to manage tickets and projects as the technology needs of employees,

doctors, nurses and patients continue to evolve and grow, so they turned to TeamDynamix for help. Covenant has been able to support the growing digital demands of healthcare. The team is enjoying custom dashboards and daily scorecards where they can easily view ticket data and drill down.

Low Admin Burden: Easy to Configure Without Technical Resources

Given that the platform is highly configurable, the team was able to easily build out the dashboards, reports & scorecards – without using technical resources.

Covenant Healthcare Migrated from BMC Remedy to TeamDynamix.



TeamDynamix had all of the advanced functionality the other products had but didn't require the need for a full FTE to manage and support the product.” Frank Fear, CIO Covenant HealthCare



“Once we saw the scorecards the team responded by driving down the number of open tickets... they're paying attention to how many tickets they are closing a day and utilizing tasks and tickets to help determine their workload.”

Raymond Hall, Technology Manager at Covenant Health

Gratz Bank Automates IT with Routing, Tracking, Change Control and More

Streamlining Workflow

The Gratz Bank is using TeamDynamix to automate and streamline workflows for delivering IT service, managing projects and change requests, and tracking technology assets. “It’s a very configurable tool,” says Project Manager Katie Hayes.

Custom Forms, Ticket Routing, Project Tracking & Change Management

The Gratz Bank was outsourcing its IT service to a third-party provider. However, IT leaders found that this practice didn’t give them the visibility they needed to plan effectively for meeting the bank’s current technology needs or anticipating future requirements.

Hayes has set up forms within the TeamDynamix platform for employees to request IT service tickets, projects or changes. These forms collect the information needed to understand the nature of a request and then route it automatically to the appropriate team members, “It is flexible at a very good price point.”



Gratz Bank moved the IT Service Desk In-house and brought in TeamDynamix.

“We now have a robust help desk application available, we have more visibility and can plan for our IT needs.”

Katie Hayes, Project Manager, Gratz Bank



“I almost never think about the administrative aspect of the platform,” Lesinski said. “That, to me, is proof of its effectiveness. It just does what it’s supposed to do. I don’t have to babysit it like I do with other systems.”

MarketLab Embraces ‘Smart Service Management’ for Faster IT Service Delivery

With the help of TeamDynamix, the IT department for MarketLab—a leading supplier of products for the healthcare industry—is changing how it operates, becoming more proactive instead of merely reactive in its IT service delivery. “We have realized improved end-user satisfaction, reduced administrative strain, optimized processes and gained better visibility with deep analytics,” explained Enterprise Systems Engineer Brendan Lesinski.

Automation Made Simple

The simplicity and automation built into the TeamDynamix IT Service Management (ITSM) platform is saving time for MarketLab IT staff. What’s more, the easy visibility into key service data is helping IT leaders glean important insights into the root cause of incidents.

As a result, MarketLab IT employees are working smarter and more efficiently, and they’re able to provide better service for the company’s employees.

No-code Makes it Easy to Quickly Customize Forms

Immediately, IT staff saved a great deal of time with the new system. The platform’s low-code, no-code design makes it very easy to make changes, such as adding new fields to forms. “What used to be a 45-minute effort now takes two minutes in TeamDynamix,” Lesinski said.

In addition, the system’s built-in automation has transformed MarketLab’s delivery of IT services. For instance, service tickets can be generated from email requests automatically. Lesinski calls this auto-creation feature “brilliant,” adding: “It has resulted in significantly less lost work.”

A Smooth Implementation Leads to Success Down the Road

A big part of the success of this project is due, in part, to the actual implementation delivery. “I’ve implemented several different systems and software over the years – everything from manufacturing-specific systems to ERPs – and the TeamDynamix implementation is the best experience I’ve had,” Lesinski said.

City of Avondale Leverages Portal, Automations Across Departments For Better, Faster Service

City governments must serve their citizens effectively, often with limited staff. The TeamDynamix enterprise service management (ESM) platform plays a critical role in helping multiple branches of the City of Avondale, Arizona, government work better together. With a more efficient organization, the city can respond to citizens' needs faster and more effectively. By leveraging a single portal with automated request routing and workflows, the team can be more responsive and transparent with citizens.

Streamlining the Employee On-boarding Process

TeamDynamix is helping to improve interdepartmental collaboration. For example, onboarding new employees is a multistep process that used to be quite cumbersome. Once new hires have completed all of the paperwork required by HR, they also need network privileges from IT. They have to be added to the city's payroll system, and they need access to the building from Facilities.

This process used to involve a lot of paper shuffling, and it could take a while to complete. Now, the entire workflow can be initiated with a single service request that is routed to the various departments automatically. "We can make sure we're addressing all of our needs expeditiously," says Scheetz. Having an automated system that keeps everyone on the same page has made working remotely much easier for city employees during the pandemic. Although in-person operations have resumed, "if someone needs to work from home, we can easily accommodate that now," Scheetz says.

Making a 'Huge Difference'

TeamDynamix has not only helped streamline workflows and improve communication among city employees; it also provides key insights that help leaders manage their departments more effectively. "We can see trends and patterns that help us deploy our limited resources in a more intelligent manner," Scheetz explains.

Leaders can see how much time various tasks are taking, so they can plan better for the future— by justifying additional hires or reassigning staff to other projects, for example. Leaders can also see which service categories are getting the most requests, which helps with resource allocation as well as troubleshooting. If there are a lot of support tickets related to a certain piece of software, this might indicate that staff needs more training on how to use it, or it might be time to look for a system that's easier to use. Having this insight allows IT and other departments to be more proactive in solving problems.

Avondale replaced HEAT (Ivanti) with TeamDynamix.



Everybody has a limited staff. Having a system like TeamDynamix makes a huge difference... We have better communication now, and tickets are getting handled much faster. The platform saves everyone a lot of time and helps us make sure that nothing gets lost in the shuffle.” Jeff Scheetz, CIO

WesternU Saving Time with Codeless Automation

At Western University of Health Sciences, David Mitchell and his team are using codeless automation to save technicians time and improve efficiencies. “We are looking at what can save our technicians time, what are we already doing that may be more efficient with iPaaS and what systems do we need to integrate with iPaaS,” Mitchell, Enterprise Application Administrator said.

WesternU started by automating simple tasks with iPaaS, things like automatic VPN access for approved users, keeping assets up to date and reconciling data between Active Directory and Banner. “A lot of these tasks aren’t tasks that are necessarily hard for anyone to do manually, it’s more that they are repetitive and time-consuming.” And for Mitchell and WesternU, that’s been one of the biggest draws for iPaaS.

“You know, we don’t have a DeLorean to get time back,” Mitchell said, referencing the popular time travel trilogy Back to the Future. “But we do have iPaaS.”



Synchronizing Ellucian Banner and the Active Directory

WesternU is using iPaaS to keep records in sync between Ellucian Banner and Active Directory.

Banner is the institution’s record keeper for student and employee records, but the data in the Banner student information system (SIS) doesn’t always match the data in Active Directory. To resolve this, Mitchell and his team built a workflow, using the Oracle SQL connector, to connect to their database and retrieve the information on file and make sure it matches the data in Active Directory. If it doesn’t match, it updates the data so it does.

By automating tasks, especially the repetitive ones, Mitchell said their technicians now have time to focus their attention on bigger issues.

For Mitchell, the codeless drag and drop functionality of iPaaS has really enabled him and his team to move quickly and creatively when it comes to building new workflows. “I’m not a programmer at all,” Mitchell said. “I don’t know the programming languages, I’m kind of illiterate when it comes to that, but I like to call iPaaS Lego programming because you just snap everything together and it works.”

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NaphCare Improves IT Service Desk with No-Code Smart Service Management

Prior to using TeamDynamix NaphCare, an Alabama-based company providing healthcare services and software to correctional facilities, was using a limited and less efficient platform to facilitate the delivery of IT service. The former IT service management platform wasn't ITIL-compliant and lacked important features, like automation and self-service capabilities.

As NaphCare provides and supports software, they needed an effective IT support team with faster response times. Switching to TeamDynamix has allowed NaphCare's IT support team to build a self-service portal and automate key processes, resulting in faster, more efficient IT service—as well as happier customers.

With the help of TeamDynamix, NaphCare's IT Service Desk team has been able to provide exceptional service with the same number of IT staff—without missing a beat.

Automated New User Creation

Barry Bowden, NaphCare's IT Service Desk manager, oversees NaphCare's IT Service Desk team which supports technology for the 4,600 people who work for NaphCare, as well as the users of NaphCare's electronic healthcare records (EHR) software, TechCare.

“About 60 to 70 percent of our time is spent supporting the TechCare product, and the rest is spent supporting the IT needs of NaphCare employees, such as creating user accounts,” Bowden says.

For instance, setting up and provisioning IT accounts for NaphCare employees is currently a multi-step process. NaphCare uses a software program called Adaxes to automate the provisioning of accounts within Active Directory, but IT staff still have to coordinate with both HR staff and the managers of various departments to confirm what IT privileges employees should have—such as whether they should get a free or paid Zoom account. Bowden's staff includes one full-time employee whose sole responsibility is to perform this work.

With TeamDynamix, NaphCare has created automated workflows for contacting HR and department heads to collect the necessary information. Using iPaaS, Bowden plans to connect TeamDynamix with Adaxes and build a customized workflow to create new user accounts from this information.

Automating this process will enable it to be completed in under five minutes, he says, with very little human intervention needed—freeing up the IT employee responsible for this task to do more strategic work, “That employee can be reallocated to other areas to work on more complex projects,” Bowden said.



“We're looking at automating tasks to take some of the things we do manually out of the hands of IT staff, so they can be more efficient.”

Oklahoma City Expedites Response Time with Self-Service Portals and Automated Ticket Assignment

ITSM Everyone Loves to Use

Prior to TeamDynamix, Oklahoma City was using a ticketing application that gave employees very limited visibility into the status of their service requests. Employees had to be connected to the city network to create and update service tickets, which was inconvenient for IT technicians working remotely. In addition, services that required the completion of routine tasks by multiple groups within IT had to be manually routed by employees.

Using TeamDynamix has brought more efficiency to IT service for city employees. With help from the new ITSM platform, Oklahoma City has built a self-service portal to meet employees' IT needs more effectively.

Now, city employees can initiate a service request from wherever they are using their phone or any other internet-connected device. Employees have more visibility into the status of their requests, and IT managers have comprehensive insight into how their department is doing.

"The feedback we've gotten is that everyone loves TeamDynamix," Business Systems Manager Dusty Borchardt says. "This is the first IT Service Management platform we've implemented that everyone loves to use."

Expediting Response Time with Self-Service Portals

Using TeamDynamix, Oklahoma City IT staff have created a self-service portal linked to an expanding knowledge base.

City employees can find answers to common problems and frequently asked questions within the knowledge base, and if they can't resolve their own issue, they can submit a service request through the portal. Based on the nature of the problem they describe; their request is routed automatically to the appropriate IT team for a response.

"Our goal is that use of the self-service portal will continue to grow, reducing our call volume and emails to the IT service desk," Borchardt says. Automated workflows also ensure that important tasks aren't overlooked when IT staff are busy. For instance, when new city employees are hired, there are many steps in the onboarding process. With TeamDynamix, the entire workflow can be initiated with a single service request that is routed to the various departments automatically. The same is true for requesting purchases and managing IT contracts.

"Before TeamDynamix, we had employees emailing requests directly to our administrative group within IT, and that was causing some issues," Borchardt says. "Sometimes requests would fall through the cracks, and months would go by without anyone noticing."

'Fantastic' Implementation with Knowledge Transfer

Borchardt describes the implementation process itself as "fantastic."

"We worked side by side with the TeamDynamix team to configure the system. The TeamDynamix consultants taught

us every aspect of the platform as we progressed through the system setup," he explains. "This helped us understand not only how to use it, but more importantly, how to think about the system strategically. It was an immediate transfer of knowledge on how the system works across all areas."

The City of Oklahoma City moved off Microsoft System Center Service Manager and brought in TeamDynamix.



This is the first IT service management platform we've implemented that everyone loves to use."

Dusty Borchardt, Business Systems Manager

Saint Louis University Creates an Agile, Efficient Service Desk with Codeless ITSM

Easy Admin with No-Code Configuration Reduces Drain on IT Resources and Reduces Total Cost of Ownership

Prior to TeamDynamix, Saint Louis University was using another tool for IT service management (ITSM), but the product was complex and hard to manage. Configuring the system required specialized coding ability, and the university struggled to hire and retain the staff needed to administer it.

As a result, when IT service leaders wanted to make changes to the system, they would contract this work out to a third-party provider. “It would take at least a month to get any changes completed,” says Cid Cardoz, director of end-user IT services for the university. “We were willing to go back to the drawing board to see if we could find a solution that worked better for our needs.”



Migration to No-Code for Faster Deployment of Workflows & Automation

Now, with the no-code TeamDynamix platform, Cardoz and his team don't have to wait months to make changes, “we're able to make changes on the fly and come up with solutions very quickly,” he says. “We have been making changes ever since we started using the system, adding new services to our service catalog—and the platform's no-code nature makes this so much easier.”

White-Glove Service Paves the Way for a Smooth ITSM System Migration

Implementing a new ITSM platform can be challenging, but Birmingham called the TeamDynamix implementation “a great experience.”

“It was a little hard for me in the beginning,” he explains, “because I was a fish out of water working with ITSM. Thankfully, with the guidance of the TeamDynamix implementation team, the learning that took place from the ground up was very helpful. Their patience was amazing, and

their knowledge of all aspects of the tool was astounding. They were able to answer questions about our processes and how to improve those using TeamDynamix. Their ability to think outside the box and show how we could configure the tool to mimic the success of other organizations was incredible.”

Within a few months, SLU had rolled out TeamDynamix with a service catalog of some 30 to 40 different types of service requests. Currently, Cardoz and his team are implementing the platform's asset management features, and when that's done, they will configure the tool for managing projects as well.

At Saint Louis University, TeamDynamix has improved efficiency and given leaders greater insight into the delivery of IT service, resulting in a much more connected enterprise. “We have our future in our hands with TeamDynamix,” Birmingham concludes. “It's been a very valuable tool for us.”

Saint Louis University replaced ServiceNow with TeamDynamix.

“What caught my eye was the no-code nature of the platform because that meant we could have anybody administer it without programming knowledge.”

Cid Cardoz, Director of End-user IT Services



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