

AUTOMATING BUSINESS PROCESSES

**TaskCentre**®

**Hatch deploys 150 plus automated processes with TaskCentre and reap the rewards.**



“TaskCentre is a mission critical application that continues to save the organization time and money. It is fundamental to every aspect of our business.”

**Rick Moore, IT Director for Hatch.**

Sage SalesLogix

**TaskCentre**®

The Leading Business Process Management (BPM) Solution

### **Business Requirements**

- ⇒ To integrate the company website and Sage MAS 90 application with Sage SalesLogix
- ⇒ To automate the creation and distribution of departmental reports
- ⇒ To automate key customer support processes
- ⇒ To enforce data quality procedures

### **Solution Deployment**

- ⇒ The Integration of the company website and Sage MAS 90 with Sage SalesLogix through the deployment of TaskCentre

### **Business Benefits Delivered**

- ⇒ Automation of report creation and distribution
- ⇒ Automated monitoring and enforcement of data quality procedures
- ⇒ Proactive monitoring and reporting on business exceptions
- ⇒ Significant increase in employee productivity
- ⇒ Proven platform for drag and drop application integration
- ⇒ Reduction in everyday operational costs

#### **► Company**

Hatch

#### **► Industry**

Education & Technology

#### **► Geographies**

United States (U.S)

## Case Study: Hatch

AUTOMATING BUSINESS PROCESSES

# TaskCentre

Orbis Software (UK)

North Carolina based Hatch are “The Early Learning Experts.” Hatch is an innovative solutions leader in creating appropriate technology and scientifically research-based products in the early childhood market.

Hatch employs approximately 150 co-workers including a nationwide network of dedicated classroom integration consultants.

### **Hatch and its initial interest in TaskCentre®**

As an organization that develops, promotes and implements innovative technology. It came as no surprise that Hatch quickly identified the technical and commercial benefits TaskCentre could provide the business. However, its initial interest in TaskCentre was driven by the company’s impending deployment of the Customer Relationship Management (CRM) solution, Sage SalesLogix.

Sage SalesLogix was being deployed to handle the many facets of sales, installation and customer support but Hatch needed to automate and extend business processes to their exact company requirements. This was made evident when Rick Moore IT Director for Hatch said, “Sage SalesLogix was identified as an excellent platform on which to manage our standard CRM processes and procedures. However, in a number of instances we identified opportunities for commercial gain through the extension and automation of our business processes.”

Rick continued, “It was at this point that TaskCentre became an integral element of our Sage SalesLogix

deployment.”

### **Hatch and its use of the Business Process Management (BPM) Suite, TaskCentre.**

As an organization, Hatch has fully embraced Business Process Management (BPM) software and uses TaskCentre to extend and automate business processes within Sage SalesLogix, Sage MAS 90, a proprietary customer asset configuration application and the companies website.

The true extent of the company’s use of TaskCentre was highlighted by Rick, “There are currently 151 automated processes in our system. When charting our mission critical systems, TaskCentre is identified as critical to our everyday business operations.”

One of the most innovative tasks developed by Hatch using TaskCentre was the management and enhancement of the company’s customer retention strategy. Rick stated, “Vital customer product line information is held within our Sage MAS 90 and Sage SalesLogix applications but this information disconnect hindered customer retention activities.” Rick continued, “Through TaskCentre we have been able to query Sage MAS 90 and pass valuable product line information into the corresponding customer account record in Sage SalesLogix. Through this integration, our CRM team has perfect visibility of all customer information to execute retention processes.”

The primary business benefit of this automated process is the timely

## Case Study: Hatch

AUTOMATING BUSINESS PROCESSES

# TaskCentre

Orbis Software,  
2 Nuffield Road,  
Nuffield Industrial Estate,  
Poole, BH17 0RB, Dorset.  
T: 01202 241115  
F: 01202 241116  
W: [www.orbis-software.com](http://www.orbis-software.com)

provision of complete information so that the company can action its customer retention program before the retention opportunity lapses.

Another key business need that Hatch automated through TaskCentre was the notification and prioritization of support tickets. Hatch wanted to ensure that all its customers received the highest standard of service each and every time. Rick stated, "Delivering leading edge technology to our customers is only half of our offering. The second element is the customer service that surrounds the technology we deploy. By utilizing TaskCentre's advanced business alerting capability, we were able to quickly configure real-time, data-driven business notifications that pre-empt potential issues."

The business benefits of customer support ticket notifications and escalations are numerous. First, they ensure that Hatch is able to dynamically prioritize customer support tickets and correctly allocate available support resources. Second, they enable Hatch to monitor and analyze common drivers for support tickets being raised and, Finally, they ensure that all Hatch customers receive the same, consistently high level of customer support.

### **Hatch and its automation of time consuming employee tasks.**

With 151 automated processes deployed, Hatch has made significant advancements in employee productivity, reduced operational costs and improved data visibility and associated decision making. Rick

gave an insight into the extent of the company's business process automation projects, he said, "We have used TaskCentre to automate management, sales, service team and payroll reports which, in isolation, removes a significant amount of repetitive administration from employee workloads. Additionally, we've established a number of exception reports such as less than stellar customer feedback. This enables us to respond quickly to potential problems."

Hatch has also used TaskCentre to manage its data quality. If an employee does not complete all the required fields within a given business application, TaskCentre dynamically sends an email reminder to go and complete the task. Hatch now operates knowing that decisions and subsequent business processes are based upon correct and complete data.

### **Hatch's future plans for TaskCentre®**

As with all TaskCentre installations, Hatch has a number of future plans for TaskCentre but primarily they revolve around application integration. Rick stated, "We will be using TaskCentre to integrate data from our website and Sage MAS 90 into Sage SalesLogix."

When asked for a final comment Rick said, "TaskCentre is a mission critical application that continues to save the organization time and money. It is fundamental to every aspect of our business."