

ROOK

ALWAYS ONE MOVE AHEAD



Helping the Community Behind the Scenes

Providing solutions for a geographically diverse non-profit organization.

THE CHALLENGE

A non-profit with several locations in small communities is struggling with IT support needs: a seemingly endless list of problems, poor network performance, and data integrity worries.

THE OUTCOME

A seamless support transition led to a quick resolution of many lingering problems. Network performance was solved, and a robust disaster recovery plan was implemented.

Over the years, our customer had tried several ways to manage their technology needs. From internal staff to contract IT support individuals, they could get only their basic needs met at varying levels.

Small problems, however, seemed to always fall through the cracks. Over time, it was understood that some issues were not going to be solved – the IT staff had left them as “this is just the way it is,” and staff members had resigned themselves to work around the problems on their own.

After meeting with the department heads to understand the challenges they faced, Rook Advisors was able to develop a plan that included a quick a seamless IT support turnover, timely resolution to the “small” problems that had been piling up, and an ongoing proactive support regimen.

While resolving the lingering technology problems was one of the initial goals, delivering a support transition that had a non-negative impact on staff productivity was the number one priority. Rook Advisors team members, who understood the business needs and the key personnel, used this knowledge to prioritize tasks and respond to issues appropriately.

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After the initial transition period, things quickly settled into a rhythm. Staff were comfortable knowing that issues would be resolved. Small problems were quickly handled so that they did not turn into big problems. The organization was able to continue business without a hitch.

THE HANDOFF

Before the transition, Rook Advisors gathered as much documentation as possible from the previous IT contractor. The documentation was incomplete, and some key pieces of information were missing.

As this is a common and unfortunate occurrence in technology team transitions, Rook Advisors was prepared with contingency plans to recreate the information through research, vendor communication, and experience.

Knowing the potential pitfalls enabled the team to quickly focus on the missing information and fill in the blanks.

KEYS TO SUCCESS

An internal project review at Rook Advisors, which is performed after every project, revealed that this project's success was not necessarily due to the expertise and technical skillsets of the support technicians.

Communication, understanding, and deep empathy for the customer at an individual level allowed Rook Advisors to be prepared, informed, and in tune with the customer. Although important, the technical nature of our work is not always the primary key to success.

TWO YEARS LATER

Two years after the initial transition, our process has been refined – working with the organization to advise them on high-level technical initiatives and adjusting our communication and support rhythm to meet the business's ever-changing needs.

A regular feedback and review process creates an open forum between Rook Advisors and the non-profit organization, resulting in a constant refinement and adjustment cycle. Like any long-term relationship, good communication allows for quick problem resolution and well-established trust between both parties.