



TKC Holdings & Covenant team up to solve a Workflow Issue



TKC Holdings, LLC was having an issue revolving around a workflow issue within their organization. TKC decided to team up with Covenant Technology Partners to use their expertise when it comes to workflow solutions. Covenant stepped in and provided a solution for the problem at hand, and put in a system to help workflow issues in the future.

Problem

TKC had many requests for new account set-ups that were being emailed back and forth with no traceability and no consistent follow-up. This process had no accountability or structure. As a result, deadlines were missed, and customers were impacted. There were last minute scrambles to satisfy customers and fulfill orders.

Project Goals

The team addressed Covenant with their goals to solve this business issue. They wanted to capture the current processes, discover the gaps and provide a solid solution. TKC wanted an automated process that would help provide consistency, transparency, accountability, accuracy and simplicity to the stakeholders.

Solution

Issues were identified, and an automated SharePoint solution was implemented using **SharePoint Lists**, **Nintex Workflow** and **Lightning forms**. TKC users now complete forms which kickoff workflows and assign tasks. The new forms guide the user to provide more accurate and complete information. Once the form is submitted, the associated tasks are assigned and emailed to the appropriate personnel.

Immediately the users know which requests are in progress, in revision, or complete and who the open tasks are assigned to and when they were assigned. This is a significant improvement over the original process of email requests being sent back and forth with an outdated Excel form. Employees can now see who made the request, who approved it, who completed the tasks, and who fulfilled the request, making the process easy and transparent.

"Adoption has been easy. The void was identified and addressed. Users are happy with the new process and are using it."
-TKC Holdings

For more information on this Client Use Case, Please contact Kurt Rolland at KRolland@mailctp.com