School Choice International Learns that Business Management Can Be Simple with Vorex

After years of using hodge-podge solutions, education consulting firm The School Choice Group found the business management solution it needed in Vorex.

For many employees, relocating for a job is stressful and overwhelming. This process becomes even more difficult when considering the impact it may have on those we love and care about, particularly the lives of school-aged children. While the perfect job is rare, if the opportunity is too great to pass up, concessions will be made. But a child's education is often an area where employees are not willing to compromise, and without context as to what the education environment may be in the place they are moving to, he or she is akin to someone walking blind through the woods.

School Choice International was founded to ensure no compromise is necessary. School Choice specializes in helping employees and their families find the school best suited to their children in the area to which they will be moving. The group researches each child's specific needs and the family's preferences, and helps identify the ideal school for them.

Jeannie Colangelo, director of operations at School Choice, acknowledges that the process is difficult for many families, so they depend on the organization to make the right choice for them. "Every single day we get a relocating family whose number-one concern is that their kids are going to be in the right schools. They really rely on us to offer the best-fit schools because parents want what's best for their kids. Sometimes it's not going be the place that they had originally thought, but then we open their eyes to all these amazing schools within the area, and they're very appreciative. They end up taking the job, and most important of all, their kids are happy."

The organization's mission of matching families and students to the right schools worked perfectly. However, behind the scenes, its IT business management module did quite the opposite. As a small education consultant group, IT was never at the top of the list of concerns. However, when the time came to choose a business management module to work from, the organization originally chose a heavily customized instance of Salesforce.com. "An employee's son made Salesforce sort of usable for us. He took it from a CRM and made it into more than a CRM — but not a project management system," says Colangelo.

As the business grew, this modified Salesforce module wasn't enough to do the job. It was time to invest in an actual project management system. The team researched a number of tools and narrowed it down to Vorex by Kaseya and another project management solution.

Initially School Choice went with the other solution based on the recommendation of its IT director. Unfortunately, the deployment didn't exactly go as planned. According to Colangelo, "To put it simply, the implementation process was a disaster for us."

After this unsuccessful beginning, the team gave Vorex a second look, eventually switching to the online business management tool. "After evaluating a few more systems, we knew what we needed to do. We began using Vorex, and it's been fantastic," states Colangelo.

The move was the right one. Since adopting the product nearly a year ago, the company has grown, and the need for a business management tool has grown commensurately. "As we've gotten bigger, we needed a more user friendly, projected-based system that everyone on our team could easily learn to use. Vorex has been great. We're really happy with how that's going so far. It's been really useful," Colangelo reports.

Kaseya Customer

School Choice International
White Plains, New York
www.schoolchoiceintl.com

About School Choice International

Since its founding in 1998, School Choice International has assisted thousands of families worldwide in finding the perfect school for their children. With over 140 consultants in 75 countries, School Choice provides school placement services to families looking for public or private school options, special needs or therapeutic schools, and gifted student or boarding school placement services. In addition, the group offers educational services to meet any need or budget – from Fortune 100 companies with substantial relocation packages, to families seeking assistance with traditional educational school admissions.

Challenges

- Project tasks and details were disorganized and difficult to manage across dozens of separate email threads resulting in lost time and customer dissatisfaction
- Previous project management tools were complicated and not easily understood by School Choice staff

Solution

- Vorex by Kaseya

Benefits

- The project management system in Vorex allows the team to view each project and all information within a single pane of glass
- Simple user interface made it easy for non-technical staff to learn and use the product

Next-Level Business Analysis with Vorex Reporting

One of the greatest advantages that School Choice has gained from making the switch to Vorex has been increased insights gathered from its time tracking and reporting features. Before using Vorex, School Choice had virtually no ability for its field supervisors to track how many hours their consultants spent working on each family's project. Creating reports about each project would often take much longer than needed, because information was not centralized. "Things unfortunately would fall through the cracks, because previously our client services team would have a bunch of folders in their Gmail inbox and that's how they would follow a project. It worked, but not very well," says Colangelo.

Now, thanks to Vorex's time-tracking capabilities, the organization can track the hours reported on family projects across a team's individual employees. This allows School Choice to analyze real-time profitability to determine how to better allocate and spend resources. Colangelo reports that it has given her company invaluable insight into how to become more efficient in its processes. "Vorex gives us vital data so we can refine our services and better understand how and what we can offer. We now can see where we can improve each service – maybe a four-hour service doesn't work, and it needs to be changed to a six-hour service. It's really making us a much tighter and smoother operation to deliver our services to our clients."

In addition, Vorex has provided School Choice's executive management team with visibility into their services and how the company can improve profit margins from it. "It's a huge aspect for our executive management team. They want to know how profitable each service is and how it can become more profitable. Thanks to reporting in Vorex, we can easily make that happen," states Colangelo.

Easy-to-Use Interface

Vorex's simple interface has made life much easier for School Choice employees. Having everything necessary to work on projects stored in one intuitive tool has changed the entire way field supervisors and consultants collaborate on projects, while also minimizing the potential for lost information.

Prior to adopting Vorex, School Choice employees communicated on projects through a number of different platforms, such as Salesforce and email threads. "The problem with the way we were doing things before was there were a lot of emails going back and forth. While email is great, messages get lost, and you don't always see them. Along with trying to keep this all together in Salesforce, it just wasn't working," Colangelo explains.

Today, with Vorex's advanced project management capabilities, School Choice is able to maintain real-time access and status of project tasks, eliminating the need to constantly chase down updates from team members. "In Vorex, everything is in one spot. You go into Collaborations and there's a project. I open it up, and here are three threads all about the project I'm working on. Everyone is collaborating, everyone is logging their input, and it's all centralized in one place. So every time I go into Collaborations, I can instantly see what's going on," Colangelo says.

Additionally, at the start of the Vorex onboarding process, the group was concerned that the tool might confuse employees, many of whom are former teachers with limited technology experience, and therefore hinder their daily tasks. The result couldn't have been further from that. Colangelo recalls, "Our staff really couldn't navigate through Salesforce given how we had customized it, and so we were concerned the same might happen with Vorex. Thankfully, the intuitive nature of Vorex makes it very easy to grasp, and after using the tool two or three times our consultants are fully up and running."

Vorex Modules Make the Business Run Smoother

School Choice also uses many of the modules that Vorex offers, especially around CRM. When the organization originally began its implementation of Salesforce, the team tried to tweak a few aspects to transform it to be a CRM that the business desired. It quickly became clear that this would not come easily, and even when changes were made, it did not fit the company's needs.

"Vorex gives us vital data so we can refine our services and better understand how and what we can offer. It's really making us a much tighter and smoother operation to deliver our services to our clients."

Jeannie Colangelo
Director of Operations at School Choice

Soon after adopting Vorex, the group found it could easily make necessary changes through Custom Fields. This has been a huge benefit for team members, because it allows them to use the tool how they want without being confined to default settings. "With Salesforce, it feels like you need a computer science degree to change a field, whereas with Vorex you can go in, go to your list of fields, and effortlessly make the change. Upgrades and downgrades are very important to our business, so custom fields has been huge for us," says Colangelo.

Another module that helped the company improve is the Human Resources portal. With employees, contractors and families located throughout the world, keeping track of all these individuals can be quite time consuming and confusing. Vorex's HR module simplifies the management of all these individuals. "We're able to keep track of employee languages and their remote capabilities to work with families outside of their location. For instance, if someone's moving to an area where we don't have a contractor on the ground, we can easily find a fit for a contractor to work with a family remotely to get them the best school fit immediately," explains Colangelo.

On top of that, School Choice is able to bill contractors through the HR portal, further streamlining processes. According to Colangelo, "Keeping track of hourly pay rates is great. When our consultants input their time on the time sheets, we can customize the report to show both time and expense, making it easier for the finance department to quickly process and pay invoices."

For School Choice, Vorex has not only been a step up from all previous tools used, but also a great enhancement to all facets of the business.

> "In Vorex everything is in one spot. You go into Collaborations and there's a project. I open it up and here are three threads all about the project I'm working on. Everyone is collaborating, everyone is logging their input, and it's all centralized in one place. So every time I go into Collaborations, I can instantly see what's going on."
>
> **Jeannie Colangelo**
> Director of Operations at School Choice

ABOUT KASEYA

Kaseya® is the leading provider of complete IT management solutions for Managed Service Providers and small to midsized businesses. Kaseya allows organizations to efficiently manage and secure IT in order to drive IT service and business success. Offered as both an industry-leading cloud solution and on-premise software, Kaseya solutions empower businesses to command all of IT centrally, manage remote and distributed environments with ease, and automate across IT management functions. Kaseya solutions currently manage over 10 million endpoints worldwide and are in use by customers in a wide variety of industries, including retail, manufacturing, healthcare, education, government, media, technology, finance, and more. Kaseya, headquartered in Dublin, Ireland is privately held with a presence in over 20 countries. To learn more, please visit **www.kaseya.com**