

Customer Story

ClearPoint Credit Counseling Solutions Achieves True Self-Service Reporting and Increases User Adoption with Entrinsik Informer

Conversation with Robert Stewart, Software Developer, ClearPoint

Pain points

- Lack of self-service reporting capabilities
- Pre-made reports did not provide all the reports and visualizations needed by the team
- Disparate data in multiple locations could not be accessed within one system

Results

- Can analyze previously unavailable information like business trends and workloads
- All data accessible from one point of access
- Using scheduling feature within Informer to automate distribution of reports



ClearPoint Credit Counseling Solutions Customer Story

Challenge

ClearPoint Credit Counseling Solutions (formerly CredAbility) is a national nonprofit credit counseling agency that helps consumers with their budget, credit, and housing issues through certified counselors. In order to create reports and analyze data to drive decisions within the organization, ClearPoint used native reports in their SugarCRM application and submitted requests for new and customized reports through Jira, their issue tracking system. The lack of self-service reporting capabilities meant staff at ClearPoint did not have the functionality required to access the information they needed when they needed it.

The premade reports in SugarCRM did not provide all the reports and visualizations needed by the team at ClearPoint. If new reports were required, employees would have to fill out a Jira request that included the query, parameters, columns, and output options, and then the IT department would email instructions on how to run the new report to the managers in the department. This continuous circle of effort was a time and resource drain, requiring multiple departments and people to be involved in creating or modifying a report.

ClearPoint also had data in multiple locations that they could not access within one system. Reports from outside SugarCRM had to be created manually, a task that non-IT staff could rarely perform on their own.

ClearPoint knew they needed a more efficient and user friendly system for their reporting needs. “We had data in multiple platforms and had to manually create reports just to access the data we needed every day,” said Robert Stewart, Software Developer at ClearPoint. “We needed the ability to take a single tool and handle all of our reporting needs from one interface.”

Solution

After implementing a free trial of Entrinsik Informer, staff at ClearPoint took quickly to the software and purchased Informer for company-wide use. Informer was chosen due to its ability to connect to multiple data sources and create reports by blending data, all with an easy, drag-and-drop interface that non-technical users could easily learn. After a fast setup process, users were up and running in no time at all. “Informer was really easy to install and set up. We had it rolled out to users in very little time,” said Stewart.

Results

With Informer fully implemented, staff at ClearPoint wasted little time in utilizing the software. With an easy to use interface and multi-source connection ability, over 60 staff members at ClearPoint are now using Informer to manage their data. “Our staff particularly likes the ability to connect to LDAP and our Exchange server. The multi-data source connection ability has made us much more efficient,” said Stewart.

With their newfound reporting abilities, ClearPoint staff can now analyze information that was previously unavailable to them. Client and business trends can be identified and recorded, counselor workloads can be tracked and balanced more effectively, and quarterly client and budget data can be accessed for business analysis and adjustment.

ClearPoint is also taking full advantage of the scheduling feature within Informer to automate distribution of reports. “Most of our daily reports are being generated through Informer,” said Stewart. “A lot of them are scheduled to run earlier so that they are available as soon as the managers come in in the morning, no extra work needed.”

“I would recommend Informer to any other organization,” said Stewart. “It has a simple, efficient approach that even non-technical users can understand and you can have all of your data accessible from a single point of access. Informer has been a great addition to our company.”



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