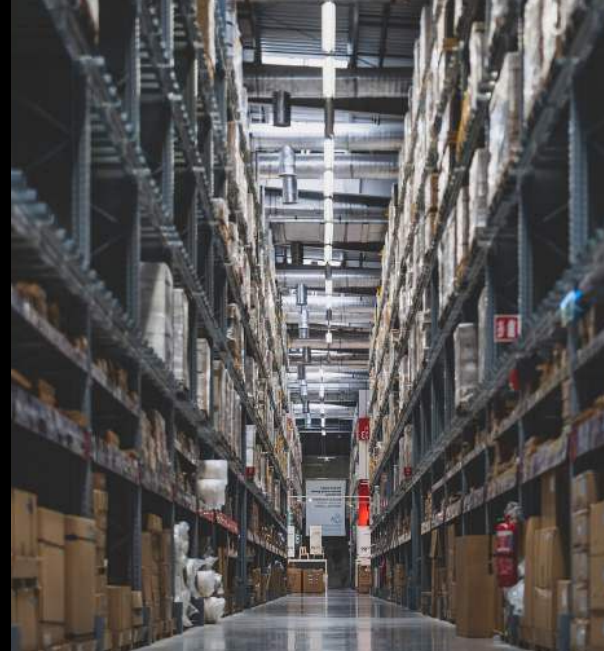


Trax Retail drives organization-wide employee experience transformation with Freshservice



About Trax Retail

Trax is a global technology company with hubs in the United States, Singapore, and Israel. The company serves customers in more than 90 countries providing services such as dynamic merchandising, in-store execution, shopper engagement, market measurement, analytics, and shelf monitoring solutions. Leading CPG businesses and retailers use Trax to create positive shopper experiences and maximize revenue potential at all points of sale.

As a pioneer in computer vision, Trax continues to set the standard for innovation and excellence in the retail technology space. With cutting-edge technology and automation, the company helps its customers navigate the new frontier of retail, where the best of the physical and digital meet at the shelf. We spoke to Meir Naim, Senior Architecture Manager of Business Applications at Trax Retail to understand more about their business, and how IT plays a pivotal role in driving business results.

Unlocking the potential of enterprise class service delivery

Trax Retail had a multitude of systems used across IT, security and other business processes posing unnecessary complexities in the way it handled organization-wide service delivery. The IT leadership team also believed that they had to work towards improving the service delivery standards within the organization, acting as one of the key drivers of the transformation.

Transformation Highlights:

- Multiple systems across IT, security and other units posed unnecessary complexities to service request and delivery
- As a swiftly growing business, there was a need for a unified platform to handle all of the employee ticketing requirements
- Scouted for a tool that could act as the focal point for all things related to service request and delivery
- Chose Freshservice for its clean UI, simplicity, out-of-the-box capabilities, customization, marketplace integrations, and impressive product roadmap
- Transformed internal service delivery with Freshservice Incident Management, SLA Management, Change Management and Asset Management
- Streamlined service delivery across IT, Purchase, HR, Travel, Security, Contract teams, among others

As a swiftly growing business, the need for a robust IT system and process was imperative to enabling employees to perform at their best, without the need to grapple with multiple tools. While the organization was always looking to have a unified platform to handle all of its ticketing requirements, the right opportunity presented itself when Trax decided to undergo an organizational restructuring to help drive its growth aspirations.

At this point, Meir and his team began scouting for a tool that could act as the focal point for all things related to service request and delivery within the organization. Trax Retail wanted a flexible and robust platform that could help do away with multiple tools, simplify processes with workflows and approval mechanisms, while providing custom reports for analytics. With Freshservice being the primary platform of choice the team also evaluated platforms from the incumbent vendor Atlassian, which was lacking flexibility, as well as ServiceNow, which seemed complicated. The clean UI, simplicity of the platform, its capabilities, customization and marketplace integrations, as well as a very impressive product roadmap made Freshservice a rather easy choice for Meir.



We needed a platform that was robust, yet simple to use, had the requisite integration capabilities and a modern UI. While looking for a platform we wanted one that would help us streamline and elevate quality of service delivery across the organization. The selection process was pretty challenging as we had a lot of checks placed to ensure that the tools we chose could enable us to execute our plan with no possibility of deviation. We called upon the Freshservice team for a demo, and we were very impressed with what they offered. In just a matter of three months we were up and running.



Meir Naim

Business Application Senior Architecture Manager
Trax Retail

Transforming the employee experience with Freshservice

Meir along with his team had laid out a very clear transition plan. As a part of the change management process, the team ensured that the new system, and the associated workflow configurations were made very clear to the agents. “It went on very smoothly” - says Meir while talking about the change management. “We ensured that the users understood the platform well. Our planning was impeccable, so there wasn't any gap in what we drew out as a plan, and what got executed.” he adds.

The IT team piloted the Freshservice platform and kept improving based on stakeholder feedback. This helped in adapting the system in a manner in which employees felt right at home while using it, thereby boosting the adoption rate. The transformation served as a great opportunity for Trax to simplify the service request and delivery process within the organization, by making the most of the tool's capabilities.

The impact of the transformation was imminent almost immediately. For instance, tracking and grading requests based on importance has significantly helped agents prioritize tickets better. Employees understood typical SLAs for their service request and were able to plan in accordance. Also, the unified service request and delivery process that started with IT paved the way for other business functions to explore the possibilities. With the transformation all tickets raised, irrespective of channel, or tool, get recorded, addressed, tracked and closed within Freshservice. More importantly the granular details of the process flow helped track requests at each checkpoint.



One of the main goals when we designed the systems was simplicity. We wanted to make sure that the user who requests a service enters just the adequate details for the agent to be able to act on it. Therefore, on the one hand we had employees not having to spend a lot of time raising a ticket, on the other, the agent has all the information they need and can quickly resolve the ticket.



Meir Naim

Business Application Senior Architecture Manager
Trax Retail

Streamlining service request and delivery across business functions

With IT witnessing significant success post transformation, Meir and his team quickly progressed towards extending these best practices to critical business functions in the organization such as Purchasing, HR, Travel, Security, Contract Management and more. Using Freshservice as the centralized platform for service requests, Trax Retail was able to integrate multiple tools and drive extensive automation through API calls. The following are some highlights on how workflows were configured across these teams:

Purchase Team: The purchasing team automated the entire workflow right from initiating a purchase requisition to eventual release of the purchase order. The seamless integration with Netsuite meant that once the purchase requisition request was raised on Freshservice, it would automatically go through a series of checks and approvals, before triggering the creation of purchase order on Netsuite - a process that previously needed manual intervention.

HR Team: With Freshservice, and its native integrations via the Marketplace, Trax retail was able to automate the entire employee onboarding and offboarding. Whenever a new user is created in the system, it automatically triggers the onboarding workflow on Okta before passing it on to Freshservice. On Freshservice, the onboarding request triggers a chain of events around hardware requests, application requests, access permissions, among others, enabling the employee to be set for work right from day 1. Similarly, once the user is deactivated, an offboarding ticket is created on Freshservice that in-turn initiates a workflow chain triggering actions across multiple systems to successfully offboard the employee.

Travel Team: The travel team workflows are configured in such a way that once the request is raised by an employee, the workflow quickly performs the requisite checks like budget availability, post which an approval request is sent to the regional manager. Once the regional manager approves the request, the workflows automatically trigger a chain of actions grouped under the post approval workflows, eventually closing the request once the employee has the ticket and other requirements fulfilled.

Security Team: The security team automated the handling of security incident management on Freshservice. The workflows were configured in such a way that whenever there was a potential security incident, a ticket gets automatically raised on Freshservice with a notification sent to the Security Manager. Depending on the nature of the incident, the ticket would get assigned to the respective agents with updates on progress and resolution sent to the security manager.

Contract Management: Trax retail maintained and managed all of its contracts via Freshservice. This included contracts with hardware & software vendors and recorded details pertaining to the terms, along with internal owners of the contracts tagged to respective departments. This helped moderate access and manage contracts just by those authorized while maintaining them centrally. Triggers for events such as expiry and renewal dates were set up to ensure the respective owners can track contracts and take requisite action.

Tapping into key Freshservice features

Meir identified four priorities of the transformation that helped Trax derive considerable value from the transformation:

- **Incident Management:** Freshservice's Incident Management was used to achieve service efficiency and faster resolution while reducing manual intervention. Since most issues were managed by predefined automated workflows, fewer tickets reached their agents. This allowed agents to spend sufficient time on more challenging and complex problems. The agent productivity and satisfaction were direct beneficiaries considering they were able to cut out primitive issues and focus on the more complex ones.

- **SLA Management:** Freshservice helped establish distinct SLA rules for multiple incident categories. Trax utilized this feature to prioritize and move the more critical tickets up the queue. Freshservice also offered a single unified dashboard, that helped Trax keep track of requests raised across categories and business units. Information on ticket status, approvals and resolution times offered greater visibility and control over SLA management.
- **Change Management:** Freshservice progressively optimized Trax's systems and processes – from tracking change requests to monitoring and reporting. Intelligent workflows facilitated ticket routing based on system, priority, and region. Agents could easily access all incident-resolution tools on a single screen. “It's worked really well. We started the process of change management a year ago. And it's going very, very well. I think it's going to be much more robust.” - said a delighted Meir
- **Asset Management:** Freshservice Asset Management system helped the company keep track of hardware devices, software and their respective contracts. They could easily assign issues to the right asset category along with the vendor data. This gave a comprehensive view to track assets' performance over time. Since asset information was built into the service desk, it was easier for IT teams to handle both incidents and assets on the same platform.

Looking ahead

The adoption and usage rate of Freshservice have been going up since its implementation. Trax is looking at automation in every department to optimize processes at scale. They are also looking at integrating third-party applications to make their infrastructure robust and efficient. Every month, more and more departments within the organization are turning to Freshservice. Trax Retail looks forward to leveraging more automation capabilities of Freshservice in the future.

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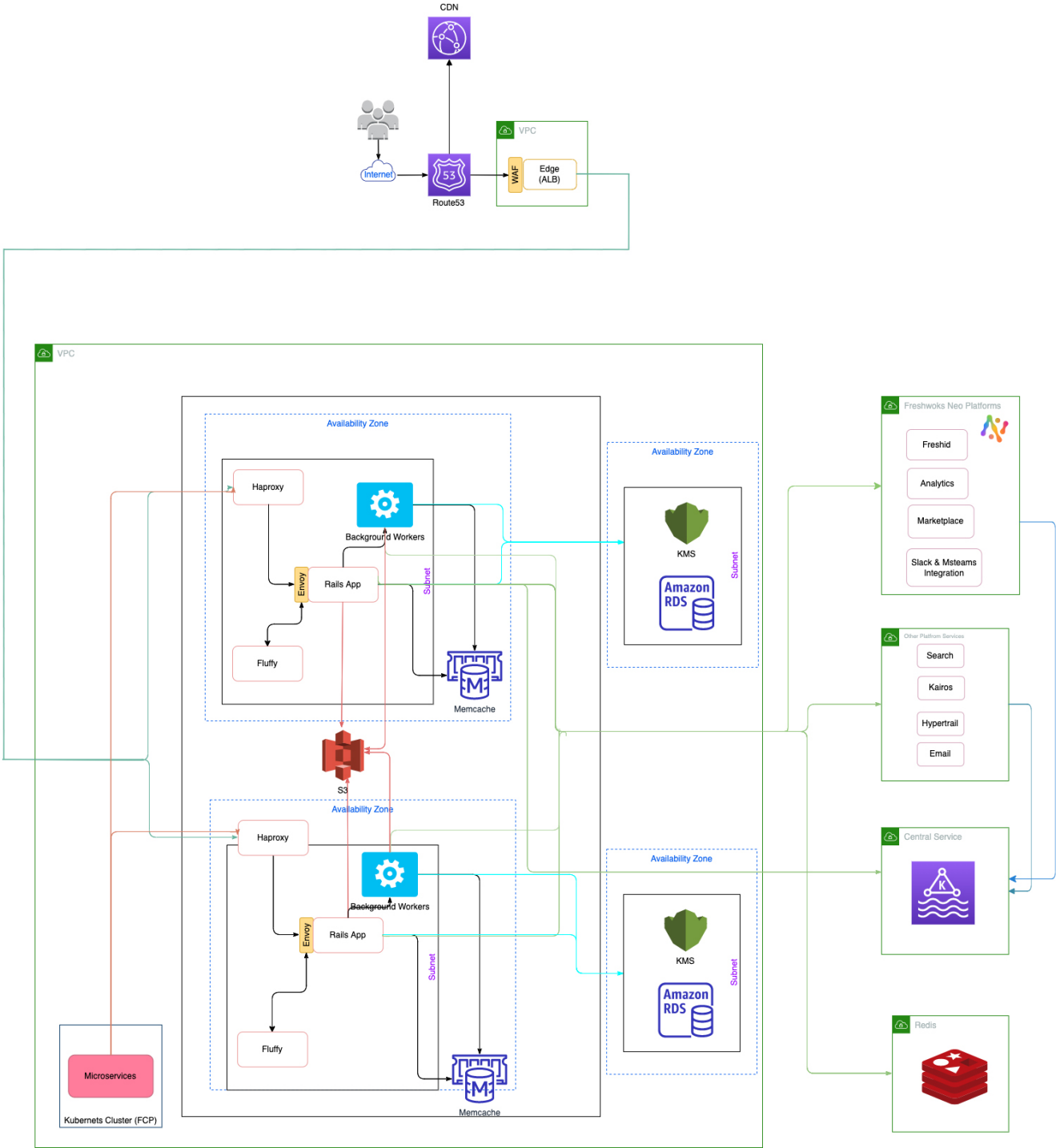
We are pleased to see how our employees and agents are benefitting from the transformation. Our objective is to double down on our pursuit towards greater automation, tighter integration with other tools and applications on our stack, and keep elevating the experience for our employees. With more and more departments looking to streamline service delivery with Freshservice, we are happy to be enabling our internal stakeholders to be at being their productive best, both today and in the future”



Meir Naim

Business Application Senior Architecture Manager
Trax Retail

Architecture Diagram



AWS and Freshworks

By hosting its platform on AWS, Freshworks is able to focus its resources on developing easy-to-use and intuitive products while leveraging a proven and reliable cloud infrastructure. With Freshservice on AWS, IT Helpdesk agents and business teams supporting employees can deliver best-in-class employee experience.

AWS Services Used

Amazon EventBridge

Amazon DocumentDB

AWS Lambda

Amazon SageMaker

Amazon Connect

EC2

Lambda

S3

Glacier

RDS

VPC

CloudFront

Route53

Global Accelerator

Cloudwatch

EKS

WAF & Shield

Certificate Manager

SNS

SQS

Secrets Manager



About Freshworks

Freshworks products are designed around the principles of simplicity and functionality. Empower your teams with solutions that are intuitive, and provide the right data to make informed support, sales, and marketing decisions. Our products do away with complex setup and manual tasks, and let you switch your focus back to growing your business the way you want.

Freshworks is an advanced top-tier technology partner of AWS and is a member of the ISV Accelerate/ SaaS Revenue Recognition & AWS Marketplace programs.

[Click here to know more about our products](#)

We're always there to help you with your queries.
If in doubt, feel free to reach out to us at
[**support@freshservice.com**](mailto:support@freshservice.com)

