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**Network Security IT Provider's Expansion Outgrows Tracking System**

*Minnesota company leaves spreadsheet method behind for customizable software.*

[Universal Network Solutions, Inc.](#) (UNS) found itself stuck in a technology pothole. UNS' old spreadsheet tracking system wasn't fitting the St. Paul, MN-based company's needs as its business boomed, fresh client contracts were signed, and new employees were hired.

"We struggled with Excel as we grew," says Cara Lundrigan, UNS president. "It was not a scalable solution for us. It was impossible to track all of the required information necessary for each project, and we had no way to report historical data easily."

UNS, an 18-year-old network security installation provider, used the spreadsheet software for about four years as a shareable scheduling tool to manage client projects and information, including dates, locations, and purchase order numbers.

"We spent so much time on a solution that provided nothing more than a good visual for scheduling," Lundrigan points out. "We needed access to real-time data to make business decisions quickly."

At the same time, UNS was adding employees who are trainers and product consultants in contract, contract-to-hire, and permanent positions around the globe.

"UNS has experienced year-over-year revenue growth since 2012," Lundrigan says. "We have doubled both our corporate staff and our network security team. We also opened an office in Canada, and we are in process of opening a division in Asia-Pacific. So, we had an immediate need to keep all our processes flowing without any hiccups."

With all this expansion, UNS soon realized its spreadsheet method was antiquated, and it could not handle all of the data required to manage each project.

"We also had issues with spreadsheets not being saved, employees viewing incorrect versions of the spreadsheet, items being deleted and changed, etc.," Lundrigan admits. "This impacted our whole business--wrong information resulted in missed deadlines, travel booked incorrectly, and revenue lost."

All of these revelations proved to be the motivator to seek out other alternatives for tracking client projects and employee resources. Cost and time to implement were big consideration factors too. UNS started testing and evaluating several tools and ultimately decided on implementing new customizable Salesforce software. Fortunately, Lundrigan said UNS engaged employees from all areas and levels of the company during the initial adoption phase.

"The transition has gone fairly well," she says. "We constantly reviewed the application and listened to our employees. The project ended up costing more than we had budgeted, but the end result has been worth it. Our timeline for the project was longer than expected as well due to our core business growth."

Now, Lundrigan said UNS is able to track and document all details and information about a project in one central location that all its users can access from anywhere at any time. Additionally, employees rely on a calendar scheduling option that allows UNS' travelling consultants to retrieve their schedules via their cell phones.

In retrospect, Lundrigan acknowledged that seeking input from outside consultants earlier on would have saved UNS time and resources.

"Get a team of users together from all levels and departments who will eventually use the tool," she advises. "There is no point in implementing an application if your employees will not use it or like using it. This is the key component."

*Janet Haney is a freelance writer based in San Francisco. Janet's brother, Matt Haney, is CEO and founder of Universal Network Solutions.*