



Windward Studios

Review From A Customer



From IT Central Station, the leading review site for enterprise technology solutions.

Review by a Real User

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Vice President of Product Management at Baker Hill

Mike Horrocks

WHAT IS OUR PRIMARY USE CASE?

Our banking industry clients, as they're using our system, have a need to generate documents that give them some flexibility that are unique to the clients' needs and to the circumstances at hand. But at the same time, they want consistency so that they're not breaking any regulations. That's exactly what the Windward team provides us: that ability to have consistent generation of documents, but at the same time to give the end-user some flexibility to create whatever they need to, based on their particular circumstances. Windward is a critical component of our next-gen solution. The solution was built around our legacy environment because we wanted to make sure that we could migrate as many clients over to it as possible, without causing disruption. Windward was a critical component of that functionality. We built it knowing full well that we would want to have Windward be a part of it going forward.

HOW HAS IT HELPED MY ORGANIZATION?

We decided to integrate Windward so closely with our next-gen product, in part, because we've had years of success with it in the field. It's been proven to deliver exactly what we want and exactly what we'd expect out of a solution. That was the biggest driver for us. It just flat out delivers. I wouldn't say it necessarily improves our organization; it does so for the clients that we work with. Some of the facts I've heard include that we've been able to save our clients between 20 and 40 percent of their time in developing these documents. They're able to build them once, make the modifications they need to, if they have to, and they're consistent. It's been a really positive experience for them. I had one client who said they're seeing upwards of 60 percent improvement in terms of the time and effort needed to generate the documents that they need to for their clients. When you think about that as a part of the process, it's pretty impressive. What ends up happening from our clients' perspective is that they're actually able to have their business users use it, versus having their IT teams involved. Anytime you can keep the IT team focusing on infrastructure and network connectivity and performance that's great. Then, the business users can build what they need and can focus on the business side of things. Also, things aren't "lost in the translation" from business to IT. A business user could express, "Well, I needed X, Y, and Z," to a particular IT person, but that person may not truly understand exactly what it is that they're trying to accomplish. If the business user can focus on doing that work, that's a huge win for them. It helps them be so much more successful in implementing their true business needs.



WHAT IS MOST VALUABLE?

It's pretty easy to utilize from an end-user point of view. They're able to make adjustments and it doesn't require massive services-engagement or anything like that to make adjustments and to invoke those across the entire enterprise. In terms of layout and design, our clients can be easily trained on it. Within just a matter of hours, our training department can make it so that it's something that our users can actually be quite successful in invoking and utilizing. In that sense, it's spot on. It's simple, it's pretty intuitive, and it's robust enough that it does the more difficult documents that our clients build within the system. Another thing our clients absolutely love is the ability to design templates within the Microsoft Office suite, because of how simple it is. They're building off of something that's familiar. When they can build off of that feature, on top of something that's very familiar, that's a plus for them. It all goes back to the ease of the customer experience. When we can train and get people up and running as fast as we can, that really speaks to the simplicity in the design of the solution. My voice here is our clients' voices. I just don't hear clients ever complain about it where they say they wish they had something different. They're all pretty pleased with the layout. The most valuable features vary from client to client. For a lot of our clients, it's the fact that they're able to tag that data easily and then have that invoked and pulled into the document. Some of our clients are looking at the nested filtering which is coming out. That's going to be a huge benefit for them because they're going to be able to nest and loop while they're also looking at filtering out certain data elements. Those are some areas that are going to be really enticing for our clients. A lot of our clients don't take the fullest advantage of it but what they love is the fact that, as they build out those documents, they're consistent each and every time. Windward's solution is just so solid that from an end-user point of view. It's really valuable in that regard.

WHAT NEEDS IMPROVEMENT?

Any time that we have wanted something, Windward has been right there to build it. I would have a hard time saying what they need to improve on. What I would say is that the industry is going to be looking for continued flexibility in terms of filtering, nesting, and building more complex, almost business-intelligence-type rules and reports. What we're going to need to see is that narrowing of the gap between the analytics and management in terms of what they're going to want to see and view. The more sophisticated customer is going to want some of that information shared back with them. That's going to be an area where there'll be some potential improvement. But the Windward team is constantly monitoring that. They've got this under control. We feel we're in really good shape with them. One of the things we've continued to hear is that our users talk specifically about AutoTag and more concepts around filtering, nesting, and sorting; more flexibility around that. Windward is pushing that envelope and they're doing a great job with it. So we're happy with it.

FOR HOW LONG HAVE I USED THE SOLUTION?

We've been using Windward in our legacy solution for about 18 years and we've been using it in our next-gen solution ever since our initial development. We've been using it there for about three years.

WHAT DO I THINK ABOUT THE STABILITY OF THE SOLUTION?

The stability has been perfect. I can't recall when we last had an issue with Windward specifically. We're going to update to the new version. We have an upcoming release where we're going to bring in some new code that we haven't been taking advantage of. We probably couldn't have our clients adopt to every version that they bring out. Our clients, being financial institutions, are a little bit more conservative, a little more cautious. But we're going to be making some updates in our first 2020 release. That's a huge thing for us. We're constantly looking to expand and get more utilization out of it.

**WHAT DO I THINK ABOUT THE SCALABILITY OF THE SOLUTION?**

We haven't seen any limitations in terms of scalability. Scalability is always one of the things that we look at. We want to be able to expand our client base and we also want our clients to expand. We've seen nothing that would indicate that we have to be concerned about that.

HOW ARE CUSTOMER SERVICE AND TECHNICAL SUPPORT?

Support doesn't funnel up through me. We do first-tier support for our clients and I'm sure, every once in a while, we've had to call Windward because something has stumped us. If there was something negative, I would have heard about it. But I haven't heard anything one way or another in terms of negativity, changes, or challenges, or support issues. Our business partner relationship means they have been pretty straightforward and pretty good in terms of getting back to us if we need anything, in all aspects. It's not just the code, but it's the business needs, it's the contract. Anything that we need to be successful, Windward is right there behind us.

IF YOU PREVIOUSLY USED A DIFFERENT SOLUTION, WHICH ONE DID YOU USE AND WHY DID YOU SWITCH?

We did not really have a previous solution. Most of the time, before Windward, it was just Microsoft Office products.

HOW WAS THE INITIAL SETUP?

I'm not familiar with how the initial setup went. Remember, we embed it into our solution. So in terms of setup, that's something that our services team helps enable with clients as they set up our solution. Ours is a bit of a unique use-case.

WHAT WAS OUR ROI?

It's the efficiency it brings to our clients' document generation. It's a hard thing to quantify, but the fact that I can have a business user write the documents and have those documents be consistent - that brings a "get out of regulatory jail"-type of benefit. Windward doesn't keep our clients compliant. It doesn't provide compliance expertise. But it provides the ability for our clients to take their compliance expertise and leverage it into their docs. That has a huge benefit.

WHICH OTHER SOLUTIONS DID I EVALUATE?

We're constantly looking for market improvements and the like. We haven't seen anybody in this particular area that can address a couple of things. It's not just about the software. It goes back to the business side of things. It's knowing that if I had to call Windward up and say, "By the way, we need X, Y, and Z," they'd say, "We're on it." You can't get that in some partnerships. I have some partners that I wish would follow their example.

WHAT OTHER ADVICE DO I HAVE?

The biggest lessons we've learned through using Windward are on the business side of things. When you're building software and you're looking for partners to integrate, you've got to have someone who is truly a business partner. We got that with Windward. I have some business partners who are not on my side as much, but I need to have their software. I don't have very many of them because there are choices in the market. But sometimes there aren't a whole lot of choices. With Windward, it's the full package. It's a piece of software that solves immediate business needs and it's a business partner I can trust. They're accessible. You can't make a bad decision with Windward. They will absolutely support you in any of your business needs. If you're an end-user, they're going to be there. They will probably push the solution further than some of the end-users may be able to take advantage of. But the fact that they will support you is a huge benefit for end-users. From the perspective of an integration partner, someone who is trying to build a solution together with Windward, you can't beat it. You can't beat the service, you can't beat the support, you can't beat the solution itself, and the cost is reasonable. I would have zero hesitation recommending them to some other software integrator. We have system administrators for our solution, and part of the simplicity and the elegance of Windward is that our system admins, with a little bit of training, can also be the same people who address all of the needs from a Windward design and

layout perspective. We do need people to maintain it and that's mostly because our clients are constantly changing their documents. A new regulation will come out and our clients are addressing that. That's part of what we're seeing. It's just a cost of being in business. In our organization, we don't have any end-users of Windward, because our clients use it. We have about 20,000 bankers who utilize our system on a day-to-day basis. So we can say that there are 20,000 people out there who, at any given time, could be benefiting from something within Windward. We don't have the metrics to say how many reports have been made. Frankly, the way it's set up with Windward - and again, part of it is that he's a great business partner to have - we don't care how many docs they render. We sell it on an enterprise basis, so we just don't track the number of documents that have been rendered. It's millions of documents. It's just one of those things where, when you turn your light on you expect the light to shine. That's what we get from Windward. I would rate Windward at nine out of ten. They're putting a lot of investment into it, but they're not a gigantic company, so they just don't have all the capital to do whatever they would want to do. That's the only reason I would hold back even that one point. I know that if I do ask for something, I'll get it. I just know that it will take some time. They're a smaller company and I totally get that. I would not expect anything else from them. They've been very good to us.

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