eBusinessStreams

Solution Description

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About Relavis

Relavis Corporation is the world leader in collaborative customer relationship management (CRM) solutions. Relavis was only the eight IBM business partner to become IBM Certified for e-business and was one of the very first companies to become a Lotus business partner. In 1993, Relavis released OverQuota, now the eSales component of the Relavis eBusinessStreams collaborative CRM solution. Relavis solutions have transformed how organizations support their customers, partners and associates at more than 500 organizations representing over 100'000 users.

Headquartered in New York City, customer confidence and trust has helped make Relavis one of the most successful and highly regarded software publishers in the CRM arena. Relavis' focus on delivering award-winning CRM solutions is driven by quality people and partners, their domain expertise and their singular commitment to customer success.

Relavis has received the 2001 IBM Beacon award for “Greatest Business Impact,” and the 2001 Lotus Beacon Award for “Best eBusiness CRM Solution.” Relavis is honored to have won the Beacon Award seven times.

Solution Description

Functionality and Approach

eBusinessStreams is both a highly configurable solution and one which, thanks to its use of open systems interfaces, can readily be interfaced to and integrated with a wide variety of other application components.

Relavis' experience has shown that CRM project success is driven by quick implementations that provide key business value to all major stakeholders. Relavis' implementation methodology is built to meet these short-term goals with little to no customization to the base product, while at the same time permitting eBusinessStreams to work within a network of other application components to address your enterprise's overall needs, in CRM and beyond.

Collaborative value of Relavis eBusinessStreams

"Customer Relationship Management (CRM) is nothing if it does not involve collaboration between customers and sellers. Competitive differentiation comes from extending CRM to the broader enterprise across all channels, segments, LOB's and product classes."(Meta Group) Customers are demanding higher quality interactions from companies and the various groups of CRM teams that market to, sell to and support them. Companies are responding to their customers by improving the collaboration between CRM units as well as customers and partners.

Examples of Collaborative CRM

The sales organization requires collaboration among sales team members to sell more complex and customized products to more sophisticated and demanding customers through a variety of sales channels. The customer support staff needs to collaborate between the front line call-center staff, and the scarce technical experts to increase speed and quality of service requests. Marketing must collaborate with sales and service to target the best potential customers, and determine the most effective methods of packaging and selling these products and services. ***Companies who have collaborative CRM activities, are strong candidates for the Relavis eBusinessStreams CRM solution.***

What is the Collaborative Framework?

Customer data and activities in all organizations are performed by people and a variety of IT systems, not just the CRM system. In order for sales, customer service and marketing to collaborate effectively, the underlying technology supporting this effort must collaborate as well. The CRM system must be able to integrate data and processes with other related systems including: Web, ERP, financial, inventory and other complementary systems, such as Business Intelligence. The CRM system can serve as a hub for these other systems and technologies to interact to support CRM users. The combination of these technologies and architectural standards offers a unique collaborative framework, allowing critical CRM collaborations to occur. Relavis has always focused on the importance of collaboration in the CRM market. Relavis understands that true collaboration is not only based on having discussion threads and web access, but that it needs to incorporate business processes, rules, workflow and messaging as defined by the customer.

CRM is a Business Strategy

According to the Gartner Group, "***CRM is a business strategy designed to optimize revenue, profitability and customer satisfaction***." Technology enables this strategy and is focused on the points of customer contact: sales, marketing and customer service. Traditionally, the customer activities at these points of contact have been independent information silos - unable to share the information they have gained about a customer relationship. In addition to this ineffective flow of information, the customers themselves are directly and proactively contacting the organization in an ad hoc manner (email, fax, phone, web, etc.). This interaction requires higher levels of collaboration within and between these customer activities and points of contact. Most CRM products are not designed to allow the high level of collaboration these new CRM strategies and processes require.

The two main distinguishing characteristics of the Relavis CRM solution are: Collaborative CRM and unique leveraging of the IBM/Lotus Collaborative Framework.

Relavis eBusinessStreams modular components allow sales, marketing, and customer services to collaborate with each other so that customers around the world enjoy the same consistent, rewarding experiences.

From demand creation, through closing and support, Relavis eBusinessStreams provides tools to effectively communicate, collaborate and coordinate Customer Relationship Management activities within organizations and with customers and partners. The Relavis solution brings the right information to the right people at the right time through highly personalized and effective interaction. Relavis eBusinessStreams is built on open Internet standards. The system is scalable, runs on multiple platforms, and easily extends to the Web and other e-commerce applications. This means it can be quickly implemented and seamlessly maintained and is a solution that efficiently manages the convergence of business opportunities and experience.

In the marketplace, the sales organization requires collaboration among sales team members to sell more complex and customized products to more sophisticated and demanding customers. The customer support staff needs to collaborate between the front line call-center staff and the scarce technical experts to increase speed and quality of service requests. Marketing must collaborate with sales and service to target the best potential customers, and determine the most effective methods of packaging and selling these products and services. Customers need to be able to easily communicate with vendors and partners when they want to and how they want to.

Relavis‘ Collaborative Approach

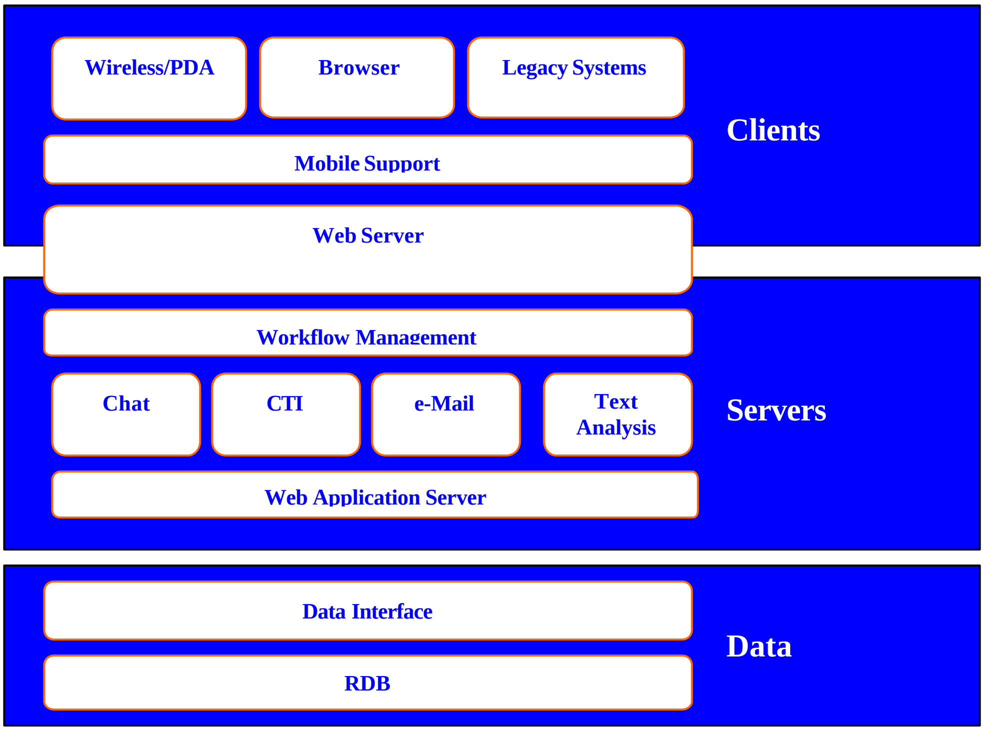
Through Relavis' collaborative approach and technology, you can now enjoy consistent, satisfying and rewarding interactions. That's because Relavis eBusinessStreams is the CRM solution that efficiently manages the convergence of business opportunities, ideas, and experience from all of an organization's internal and external teams - sales, marketing, service, business partners, *and customer*s. More importantly, Relavis eBusinessStreams keeps all of these teams focused on the customers' needs, facilitating successful, long-term, profitable relationships. Relavis eBusinessStreams was built from the ground up to support the high level of collaboration that these new CRM processes require.

Customer data and activities in organizations are accessed by a variety of IT systems, not just the CRM system. In order for sales, customer service and marketing to collaborate effectively, the underlying technology supporting this effort must collaborate as well. The CRM system must be able to integrate data and processes with other related systems including: Web, ERP, financial, inventory and other complementary systems. The CRM system is the hub for these other systems and technologies to interact with CRM users.

Relavis' Collaborative Framework

Therefore, a CRM solution requires a "Collaborative Framework" which allows these supporting systems to interact effectively and easily. Components of the Collaborative CRM Framework include: RDBMS, Email, CTI technology, web systems, instant messaging/chat, business intelligence, wireless technology, hardware/servers and services.

In order for these systems to collaborate, common industry standards and open system architectures are needed. CORBA, JAVA, web browsers, TAPI/JTAPI standards make this integration possible. As a result, organizations do not have to make unnecessary IT infrastructure investments in order to implement and integrate the Relavis CRM solution. Additionally, organizations will not have to make significant investment to re-integrate these systems if related systems are changed (i.e. a new ERP or web system).



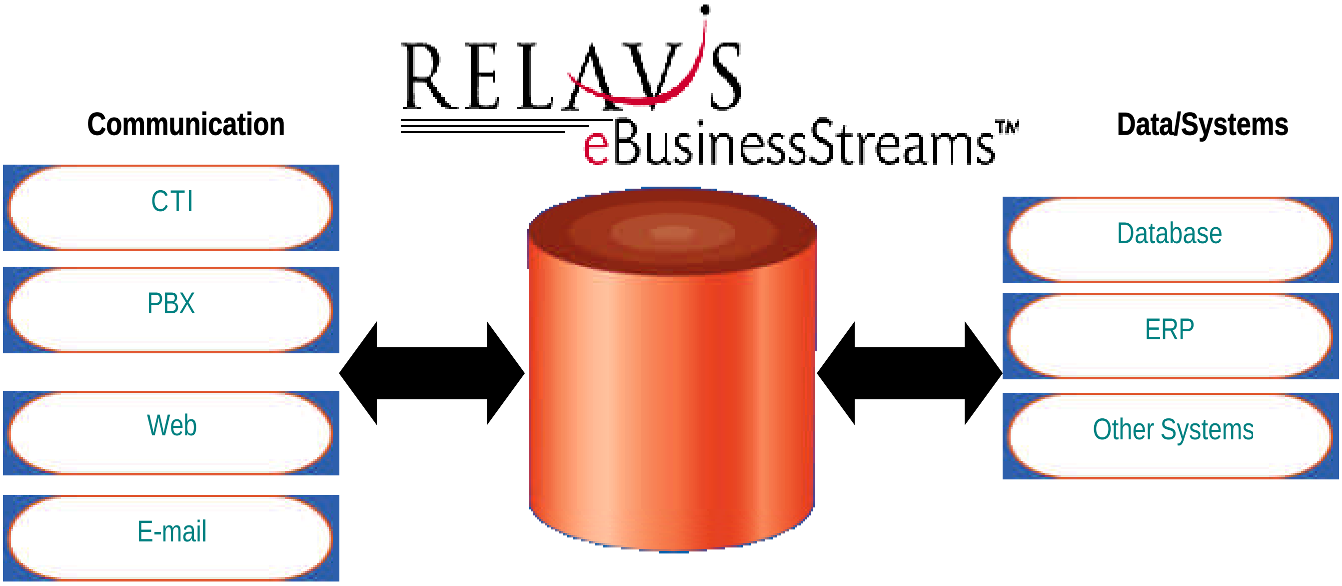
Leveraging the Collaborative Framework

Relavis eBusinessStreams leverages the IBM e-business Architecture and uses WebSphere, Lotus Domino, RDBMS, CTI, Text Analyzer and wireless technologies. By aligning the Relavis architecture with IBM, customers are assured to get the industry's most comprehensive, flexible, customizable and open platform available. Relavis eBusinessStreams provides a modular approach to manage, and deploy a collaborative Internet-based CRM solution. The Relavis framework provides a set of components specifically focused on sales, service and support and marketing processes. This facilitates true extensibility and scalability of the Relavis eBusinessStreams three-tier process-driven architecture through the provision of modules that can easily access information from other applications and vice-versa.

Coupled with a powerful set of tools that separate the development of business logic from application logic, Relavis eBusinessStreams constitutes a comprehensive environment for the development and deployment of a complete collaborative CRM solution. This suite has extensive international support and is available in English, French, German, Spanish and Japanese. Customers can purchase individual components or the entire enterprise suite to meet their strategic e-business needs.

Examples of the Collaborative Framework

The essential pieces of this CRM framework include: RDBMS, Email, web systems, PBX and CTI technology, text analysis, instant messaging/chat, business intelligence, wireless technology, hardware/servers and services. Many organizations are already using PBX, email, RDBMS (relational database), web systems and other collaborative technologies that Relavis can utilize to quickly and cost effectively implement the right CRM solution for each company.



Main features of Relavis CRM

eSales	eService	eMarketing
Collaborative Account Management ▪ Contact Management ▪ Organizational Profiling ▪ Activity Management ▪ Email, calendar and scheduling integration	**Single Customer Communications Queue** ▪ Phone, Fax, Email, Web and Chat	**Mass Mailing** ▪ Letters, Faxes, Emails
Opportunity Management ▪ Opportunity Forecasting ▪ Pipeline Management ▪ Sales Process Management	**Incident/Request Management** ▪ Skills or Rule-based Routing ▪ Automated Escalation ▪ Problem Identification and Resolution ▪ Automated Scripting and Workflow ▪ Knowledge Base	**Lead Management** ▪ Web Site Capture ▪ Scripted Questionnaire ▪ Qualification and Routing
Integrated Sales Library ▪ Product and Competitive Library	**Self Service Portal**	**Campaign Management** ▪ Customer and Market Analytics ▪ Scripted Campaigns

In summary, Relavis is the only true Collaborative CRM solution that fully utilizes a "Collaborative" CRM framework. Relavis is the right CRM solution for organizations wanting to perform collaborative CRM activities and easily integrate CRM data and processes with other related systems. It consists basicaly of three modules which are described below.

eBusiness Streams Key Differentiators

We are confident that the key differentiators of Relavis eBusinessStreams can bring significant value to your business in its relationships with your customers.

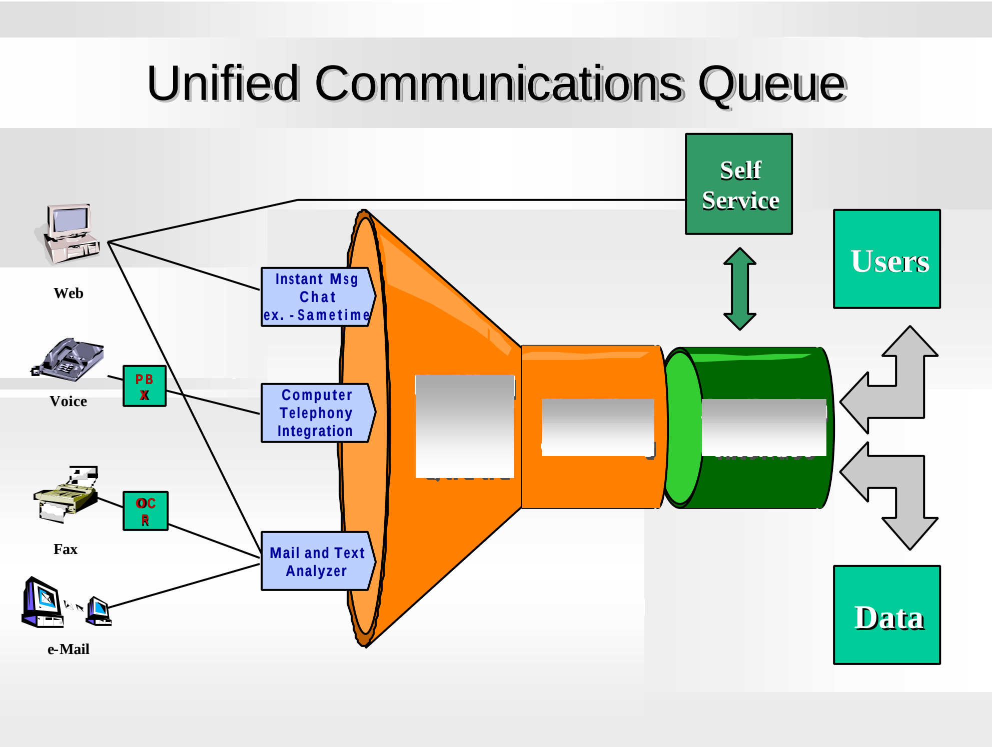
- **Separation of business logic from application code**
  This key differentiator allows business owners and managers the ability to configure all the workflow, business rules and processes necessary to support their organization without any programming.

- **Graphical interface for defining all the systems business workflow**
  A graphical interface for the business owners to easily map the various workflows they need. No rogramming needed.

- **Graphical interface for defining customer escalations**
  A graphical interface for the support center manager to easily map the escalation requirements and flow.

- **Open Standards**
  Uses component technologies and Internet industry-standards to allow integration of existing systems and architectures.

- **Unified Communication Queue**
  Ensures that all customer interactions, regardless of medium (phone, fax, email, web) are handled using the same collaborative and workflow/routing rules. This ensures consistency of service quality across all customer touch points.



- **Unified Work Queue**
  This is where the customers support and call center representative's work. Based on the customers' business rules all requests will be properly categorized and ready for resolution here.

- **Remote usage**
  Unitizing remote access technology such as Lotus Domino Offline Services (DOLS) or a Notes client you can work in a totally disconnected environment with your browser.

- **Collaboration**
  Provides a standard framework for creating a true collaborative environment based on business rules, roles, workflow and security.

- **View Builder**
  You can easily and dynamically build online views using simple or complex Boolean logic and joins from any Domino database or relational data store.

- **Tight Integration with Notes messaging infrastructure**
  This tight integration allows for a much more effective collaborative system.

- **Full international support**
  Currently available in English, French, German, Spanish and Japanese. The system supports local currencies with automatic corporate rollups as well as automatic formatting of mailing addresses and dates to the formats used in a particular country.

- Lotus customers can fully leverage their existing Lotus notes software and hardware infrastructure leading to significant cost saving. Possible hardware upgrades need not be a big investment compared to a non-Lotus solution which may require completly new infrastructure. Implementing a new infrastructure means extra cost not just in price of hardware but also in staff training and ongoing maintenance of that environment.

Benefits

A key challenge for any organization is the establishment of an effective method for communicating and collaborating across the entire organization. How well an organization can communicate amongst its various parts can mean the difference between winning and losing customers and the market. Relavis eBusinessStreams offers the following benefits:

1. **Connect** all of the business process stakeholders (organization, employee, channel, and customer) on the process, system, technology, and data levels
2. **Communicate** within and between different parts of the organization, its employees, its channel, customers and the open standards-based systems architecture required to support it
3. Get everyone involved with your company's relationship with its customers to effectively and efficiently **collaborate** on furthering the needs and success of its customers and your company.
4. Keep everyone involved in managing the customer relationship to stay focused by presenting the right information, at the right time, and within the correct **context**

Sales

- It helps them focus on the right business priorities, opportunities and relationships so they can make and exceed their sales quotas.
- It provides and coordinates the resources needed to support and advance these priorities, opportunities and relationships.
- It reinforces a company's sales and relationship processes by guiding individuals and teams through the right steps at the right cycle stage based on best practices.
- Easy access to and use of the right people and information resources during the sales cycle.
- Understand your customer's business so you can sell the right products and services.
- Effectively manage key accounts and sales campaigns.
- Save time. No need to create special reports (e.g., forecasting) because it's a by-product of using eBusinessStreams to manage your sales opportunities.
- Immediate access to the latest marketing support materials
- Easy access to product and technical experts

Sales Management

- Sales managers know that if the system provides the reps what they need, then the managers will in turn get the information they need (forecast and pipeline information, etc.)
- The opportunity management system provides information on opportunity profiles and keeps managers up to date on forecasts, activities, next steps and closing business.
- eSales supports the changing role of sales managers. In exchange for all the information field reps are providing from the field, team-based selling is requiring sales managers to provide timely, insightful feedback.
- eSales gives managers the means to provide and collaborate strategically with reps on each of their opportunities.
- Managers have the tools to act as a coach, to see things about strategy or make tactical suggestions that a rep might have overlooked. This can be done on an individual basis, or as a team. Best of all, eSales helps managers do all this proactively. eSales helps managers become more effective.
- It's the sales process component (Opportunity Management System) in eSales which enables an organization to define best practices that guides the sales rep, at any level of experience, to make sure the best things are going to be done at the right stages of either a sales process or a relationship process.
- In eSales, companies can define their own sales cycles and relationship cycles. There is flexibility to define different sales processes in different ways; customer (specific customer or by customer type), industry, market, geography, product/service, etc.
- Continuously improve and refine sales processes based on analysis of what's working and what isn't.
- Save time - No more chasing after reps to submit their reports (e.g., forecasting). No more compiling and calculating reports.

Marketing

- eSales' marketing tools help raise the understanding of each customer's experience with your company, uncover new opportunities and manage custom tailored campaigns that extend the relationship. Marketing information is tightly integrated with sales functions for review, collaboration and coordinated action by the entire team.
- eSales provides powerful automated collateral fulfillment and distribution capabilities via the Web, e-mail, fax or hard copy delivery. At the same time, critical marketing messages for customers, channel and business partners, industry analysts, etc., can be automatically published to your Web site through controlled workflow processes.
- eSales also manages automated lead generation from your Web site. Information is gathered, analyzed and processed according to company-defined rules and distributed to appropriate team members for immediate action. Analytical tools help you monitor all aspects of lead management effectiveness.
- Like sales, marketing teams can define specific processes for various marketing functions and link activities to specific projects. The same functionality for team definition and coordinated workflow applies here as well.
- Marketing can provide sales reps, channel partners and customers with audience-specific information about products, pricing, strategies, etc. Companies can control all stages of the publishing process and information can automatically be published to the Web.
- Manage the success of each marketing program
- Use input from teams and brainstorm with them on customer issues, competition and new products and services.
- Control the document publishing process to the right audience.
    - Do it once
    - Automatically publish to the Web

Implementation Team

- The speed and ease of configuration to look like your business for immediate impact.
- An implementation methodology that insures success.
    - A proven, documented methodology for implementing eBusinessStreams to phase in capabilities over time so you won't overwhelm your organization.
    - Focusing on and applying technology only to those areas of your business where there will be the greatest impact.
- Multiple levels of user and technical training, supported by documentation, are provided so that your organization is able to become self-sufficient.
- Most of eBujsinessStreams can be configured saving time, money and effort on customization. Open code and customization tools are available for handling unique business needs.
    - Relavis offers insight beyond eBusinessStreams. We teach customers how to manage the entire project for success.
    - The added value provided during the sales process helps customers understand all aspects of successful CRM project management. We go beyond just providing product specs — our customers get an invaluable education that helps them involve the right people in their organization and develop the right decision criteria.

Corporate

- eBusinessStreams not only provides necessary facts and figures, such as sales history or order status, but is exceptionally good at integrating this with "soft" information from people across the organization — things about the customer, past actions, insights, shared know-how and expertise and more — and best practices that are the real secret to making relationships work.
    - eBusinessStreams does all this by fostering and enabling coordination, collaboration, communication and participation.
- In addition to being a team-based solution, eSales addresses the needs of selling consultatively to enterprises.
    - Many to many selling that means your team selling and supporting to multiple people and groups within the customer organization. eSales manages the needs of geographically and organizationally dispersed individuals and groups, both within the customer's organization and your own.
- Whether your business is a multi-national enterprise, or a small business in an international market, eSales enhances your ability to effectively leverage and communicate with every member of your sales force—anywhere, anytime, in multiple languages and currencies. To enhance global communication, eBusinessStreams provides secure, reliable access for anyone using a standard browser accessing the Internet.
- The keys today to managing relationships are inspiring customer loyalty and owning as much of the customer as is possible (share of customer, not market share). In a team environment, it's critical for everyone to understand each customer's priorities and needs, and then share and use what they know about them throughout your entire organization and channels.
- Customers perceive a singular, informed, productive relationship with the company. All the people that touch the customer, regardless of channel, communicate the same messages.
- They have access to the same information, make updates as needed, and know how to update others on the team, particularly when the customer is present. Whomever is handling the customer at that time knows as much about the customer as the last person did or as much as necessary.
- With eBusinessStreams, the coordination and communication is part of how work gets done; it's not through separate, out-of-context email. In eBusinessStreams, email is just the delivery mechanism and

actually gets thrown away. The ideas and issues that make up the message are saved as activities and placed in the appropriate context (i.e., what type of activity and what or who is it associated with).

- eSales lets you configure your own sales processes and teams. There is always a seamless handoff of information that keeps the team operating effectively and performing cohesively. The customer's confidence in the company grows because they believe they have a relationship with a company that is listening.
- People get answers to their questions from others that are topic experts. Questions and answers can be made available to any audience you select making a single store of knowledge that people can quickly and easily access.
    - Building and retaining the company's intellectual capital
    - Fast and easy access to this knowledge, when and where people need it
- Discussion and participation are critical to promoting effective team processes. Team Talks provides a forum for discussion on topics relevant to users. People benefit from the contributions, which become a motivating force for using eBusinessStreams.
    - The point here is promoting effective team processes
- eBusinessStreams provides value to the specific needs of organizational role while contributing to the benefit of everyone.
- eBusinessStreams makes sharing easy so you can benefit from best practices.
- Successfully managing sales and customer relationships means more than just managing data and numbers. It's more than knowing what the customer bought last month or the status of their most recent order.
    - For example, what did we say to a key customer? How did we treat them? What letter did we send them or what service did we perform? How did we prepare for a meeting in terms of material, or people we brought? eBusinessStreams has always been good at integrating facts with pieces of "soft" information, intelligence and best practices. These are the type of information that really make business relationships work.
- It's important to have a place to track your to dos and follow ups. And you need a place to look at your calendar. All of that is important, but it's not the emotional or the real draw of eBusinessStreams. That's basic stuff that sales reps have always been doing and they don't need a system to do that. Any sales person can track their information because it's their own. Instead, the value of eBusinessStreams is having all the important information organized and supported by the expertise and efforts of others that share your objectives.
- Know more about each customer and how to server them better
- eBusinessStreams not only benefits the sales rep, but everyone in the organization who impacts sales and customer relationships.

Channels

- Extended sales team members can either be internal (e.g., marketing, customer service, legal, finance, technical support, R&D, manufacturing, logistics, etc.) or external (e.g., business and channel partners and other third parties).
- Sometimes, companies assume that "occasional" users (people other than sales reps and sales managers) will only want to look at isolated pieces of information or deal only with the action items assigned to them. The truth is, they want to see the big picture and gain intelligence to better assess what they need to do and understand the significance of their contributions.
- eSales integrates extended sales team users into the sales and relationship processes. They can track progress, see what has transpired and what the next steps are. Like sales manager, the workflow processes can proactively inform people and give them a head start in whatever support they'll need to provide.
- Leads and opportunities can be selectively distributed to channel partners along with all supportive contact, activity and other information.

- Managers can see the pipeline movement of the deals shared with partners the same way they can see it for their internal people.
    - Traditionally, vendors would fax or email leads to partners, have a conversation with them, and then hope to get any kind of timely feedback. In the best case, managers occasionally received forecasts from partners. But with extended enterprise selling, managers can get them on a continual timely basis.
- eSales becomes a tool for partners to manage their businesses effectively. They'll use it for the same reasons you do — to have sales reps better focus on their business. It's a tool for them to work with you and manage their own business.
- eSales enables you to step in when your partners need help and to strategize business as if you were working with your own internal people.
- As with customers, eSales helps you evaluate whom your best performing partners are, who has growth potential, and who is not contributing.
- eSales helps you further bond relationships with each of your partners. Sharing, participation, coordination and communication all help make partners feel like they are an important part of your organization. They'll be more knowledgeable, better trained and more committed because they are getting the information and they need.

eSales

Brief description

Relavis eBusinessStreams eSales component enables teams to sell strategically through highly collaborative and coordinated account plans that greatly improve interactions with customers and channel partners. By understanding and sharing the customers' needs and preferences, the organization builds customer loyalty by providing them a unified and focused experience.

eSales allows everyone on the sales team or interacting with the customer or prospect to have all the necessary information to make informed decisions. By effectively and securely sharing information, customers benefit by getting consistent and knowledgeable support, which will increase their loyalty and result in higher margins and increased sales.

Areas of focus are Collaborative Account Management, Relationship Management, Contact and Activity Management, Lead and Opportunity Management, Knowledge Management.

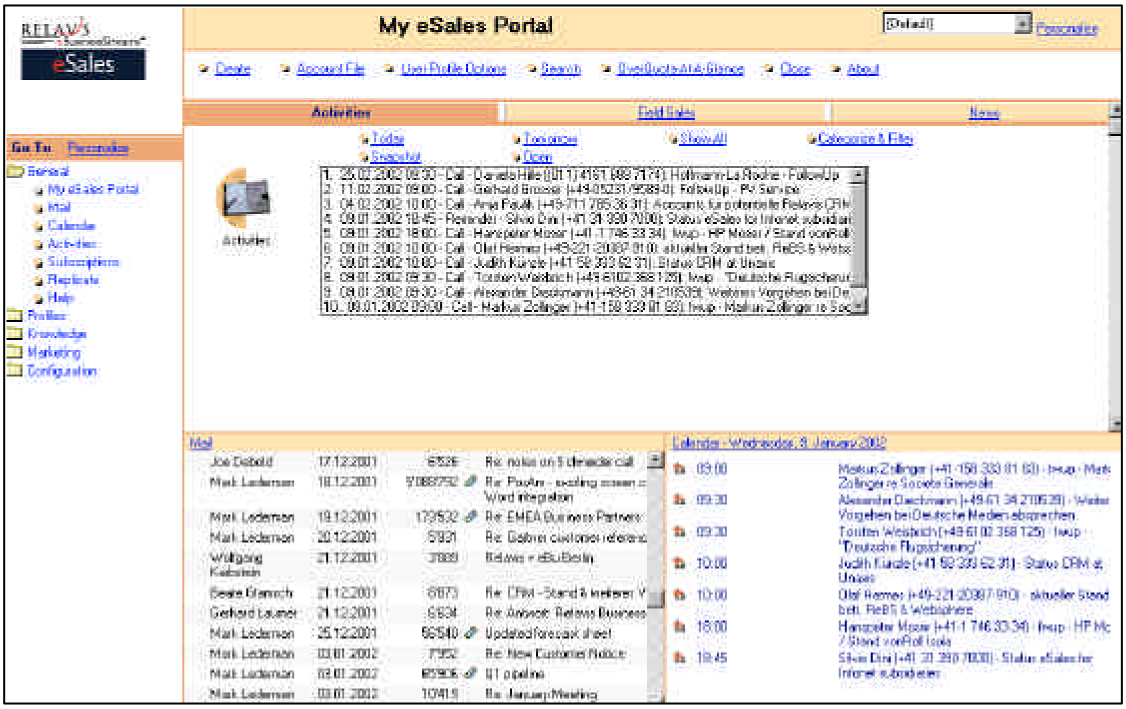
Key eSales Features and Benefits include:

- Strategically manage customers and partners based on the value of their relationship
- Better understand prospects and customers
- Enable geographically dispersed teams to seamlessly build and share strategic account plans
- Support Global cross-functional team selling and account management
- Increase revenues
- Lower competitive risks
- Fully integrate with Lotus Notes Messaging and Calendar/Scheduler.
- Manage leads from all sources through a single communication queue
- Reinforce sales best practices and processes
- See all interactions (scheduled and unscheduled activities, plus inbound and outbound correspondence) recorded for each contact in the system
- Configure sales cycles that reinforce sales processes and best practices
- View automatic rollups of opportunity information and forecasts at all levels of the sales hierarchy

Screeen Examples

Portal Page

Each user has his own Portal page. It can contain a summary of information stored in eSales, e-mail or calendar, and a World Wide Web site that interests you. In addition, user can create multiple Portal pages, each with their own selection of information.



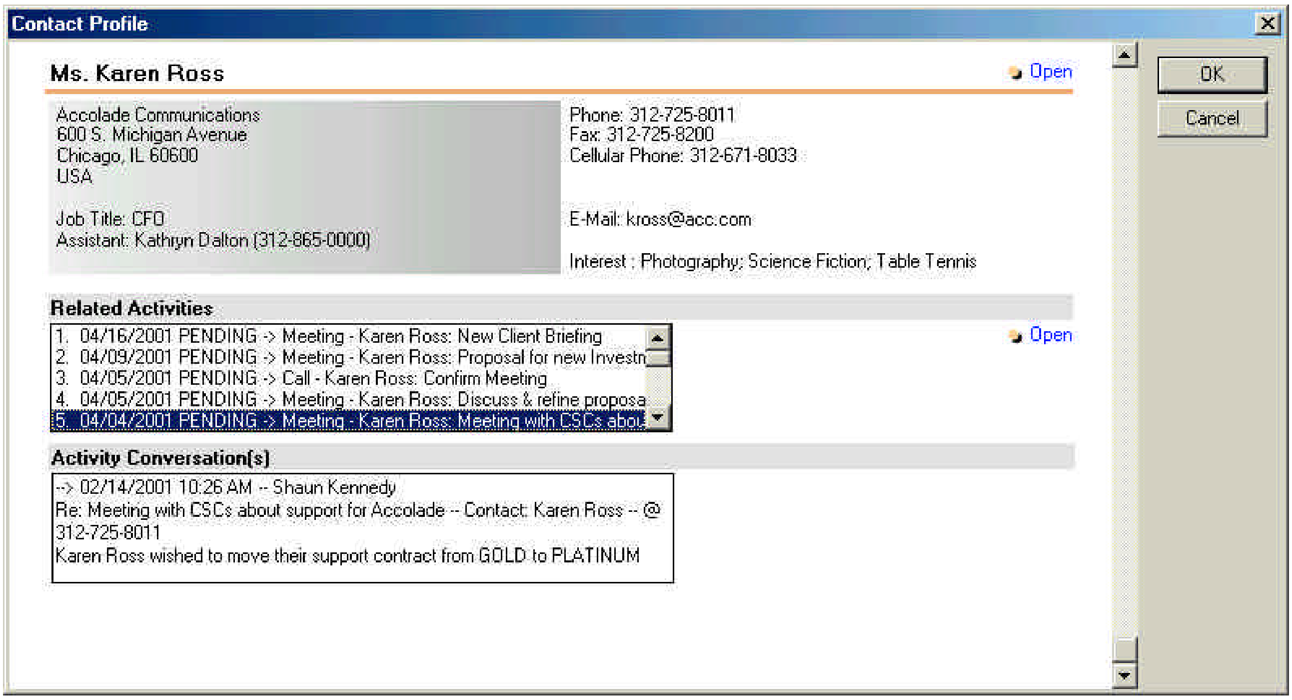
Comprehensive view of customer

Activities can be created from anywhere in Relavis eBusinessStreams or from the Notes Mail database. They help to track details and inform co-workers, thereby reducing the administrative burden.

There are three types of Activity documents:

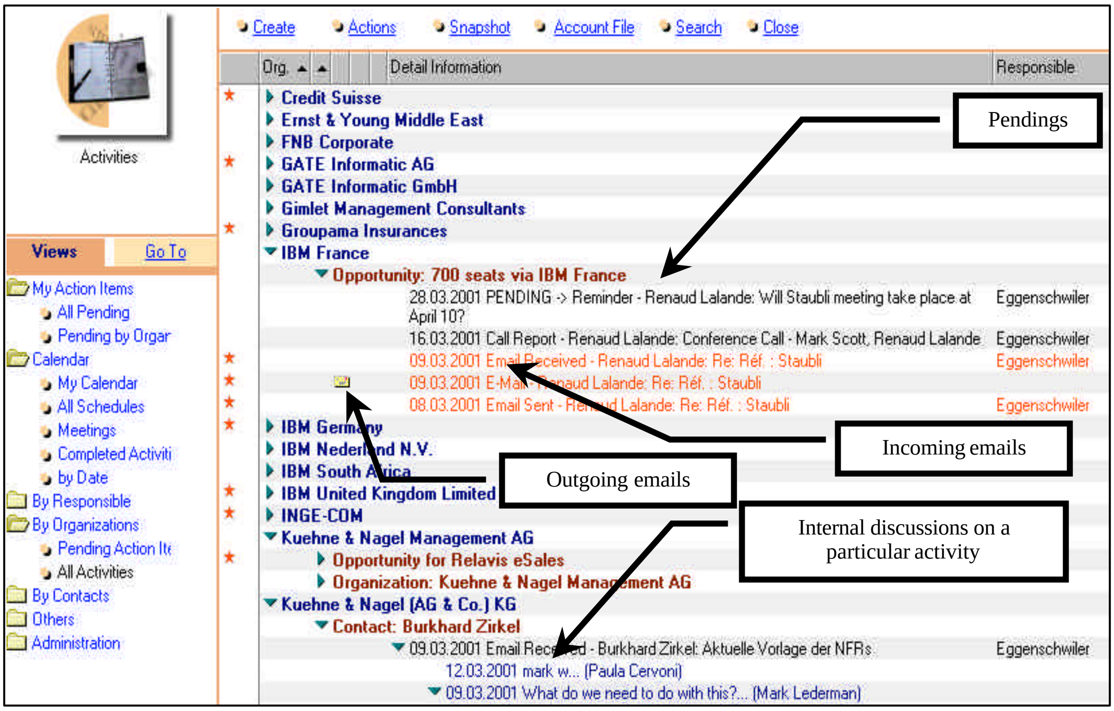
- **Scheduled Activities** are tasks which are date-related and appear in the Calendar. These can include meetings, conference calls, telephone calls, and special dates.
- **Send Activities** refer to simple communication tasks such as sending letters, faxes, and e-mails. User can create a Send Literature/Materials request which becomes a task for the administrative assistant so that he or she can send product collateral to a customer.
- **Write Activities** represent reports or other documents needed to write or store.

The examples below show a snapshot. A snapshot provides name and address information and a summary of all Activities associated with the selected profile. It also displays any conversations that are stored in the related Activities. A hotspot is provided to open the actual profile or one of the related Activities.

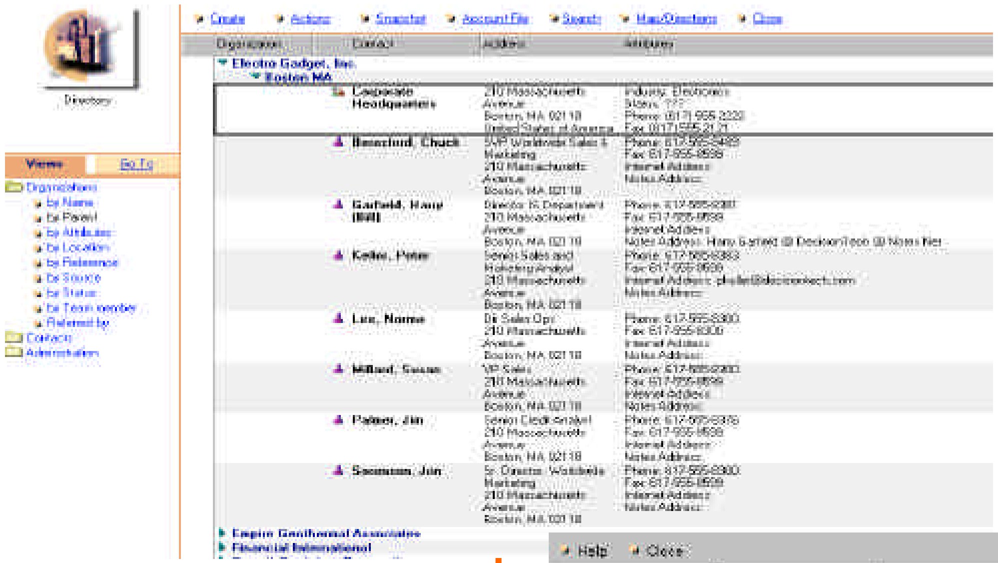


Monitor account sales activities

Below an example that shows all activities related to a specific organization.

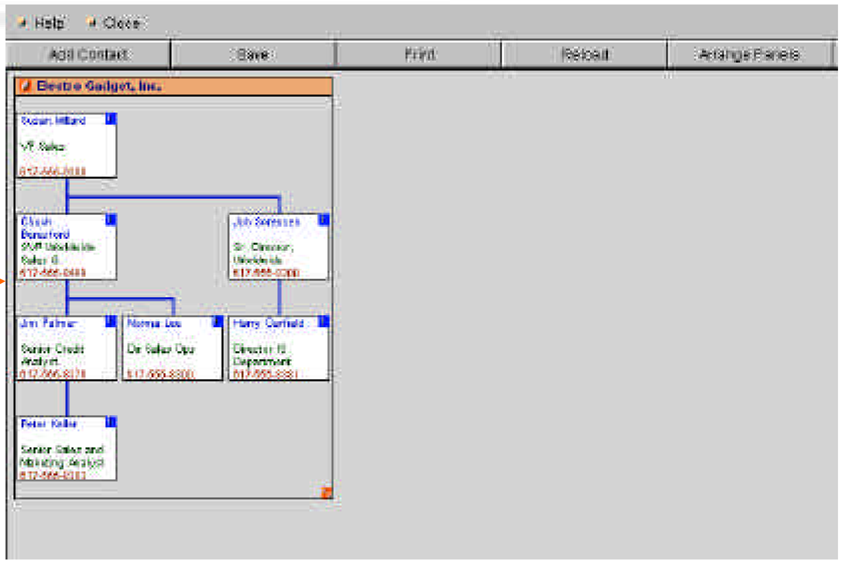


Managing organizations and contacts



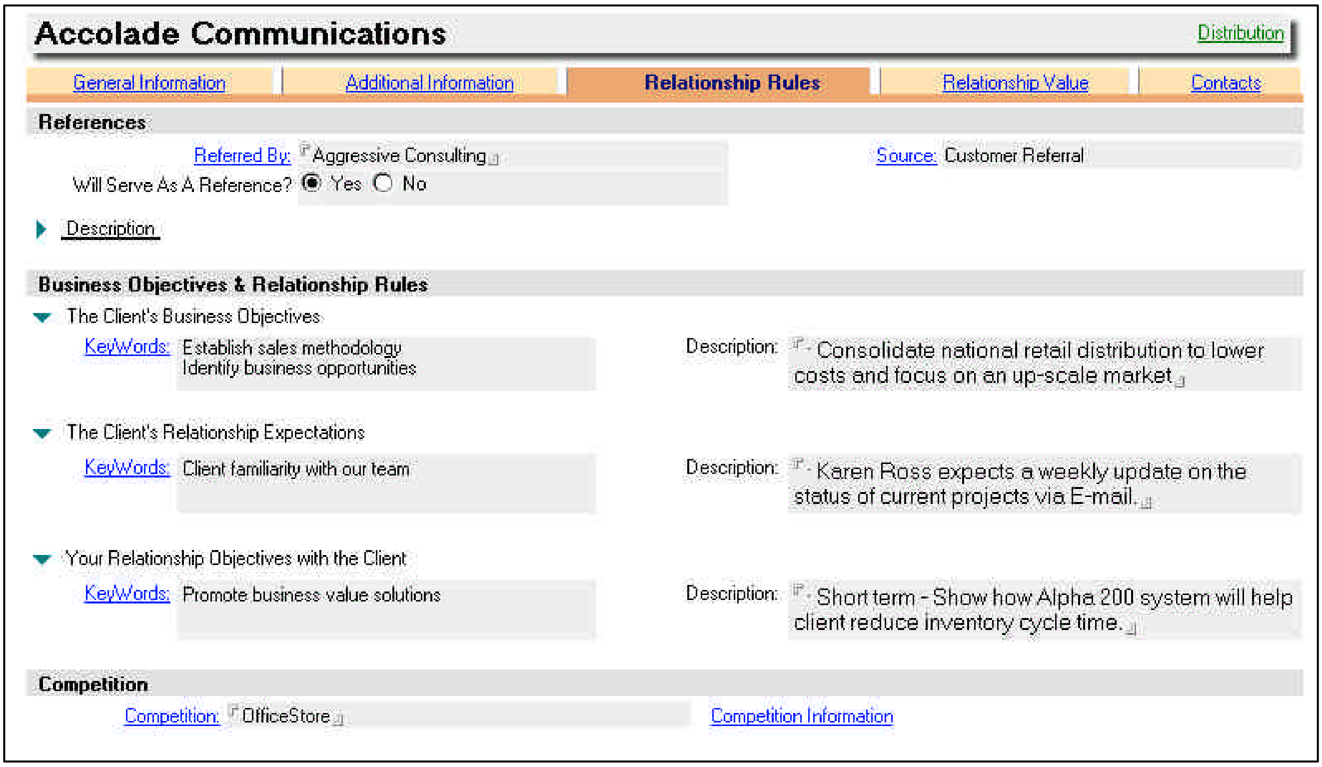
eSales allows users to improve their customer relationships by charting the organizations.

To the left, all related contacts within a particular organization are shown.



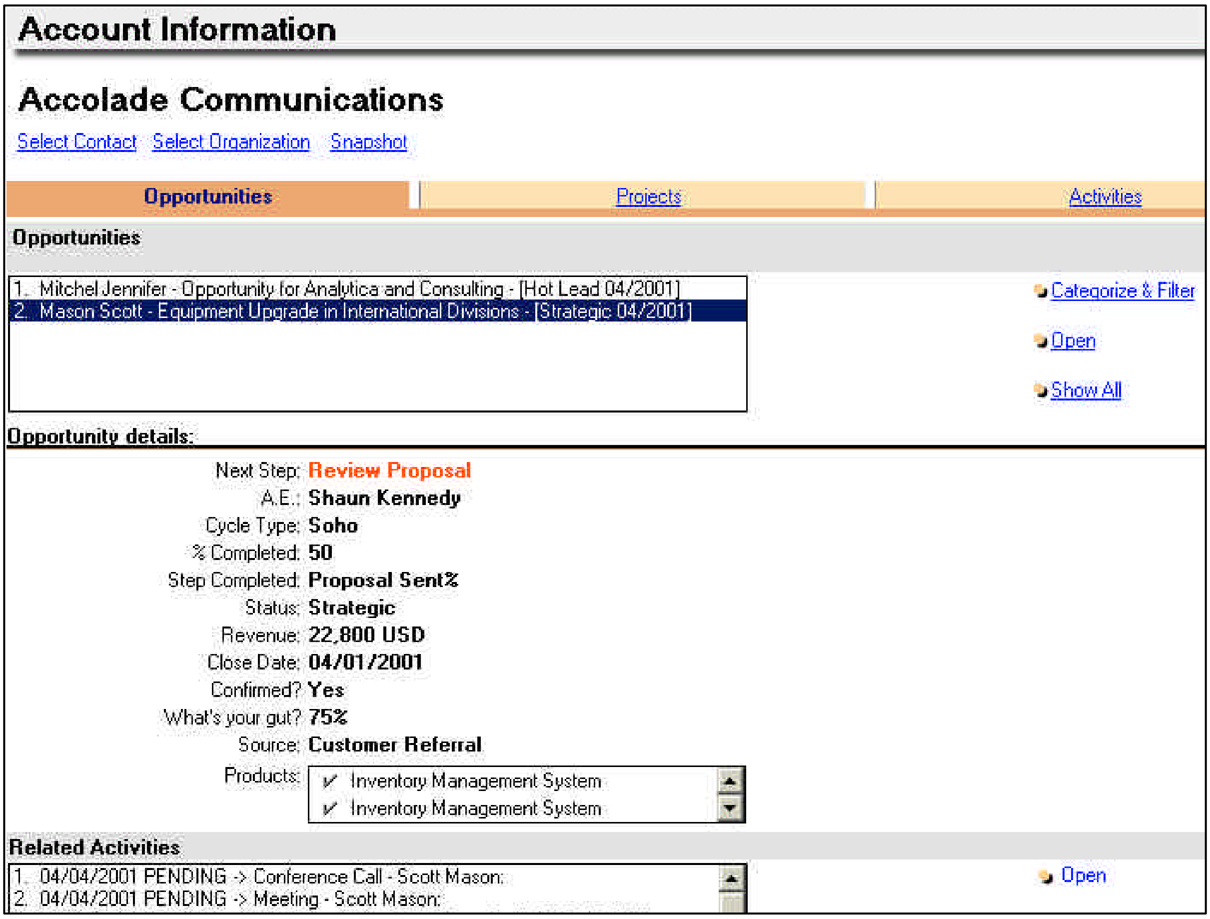
Same organization as above to the right, presented in an organization chart. The chart will be generated automatically by the system.

Managers can build in important strategic goals, specific to each account, for building relationships that will improve the way that sales representatives sell to their customers.



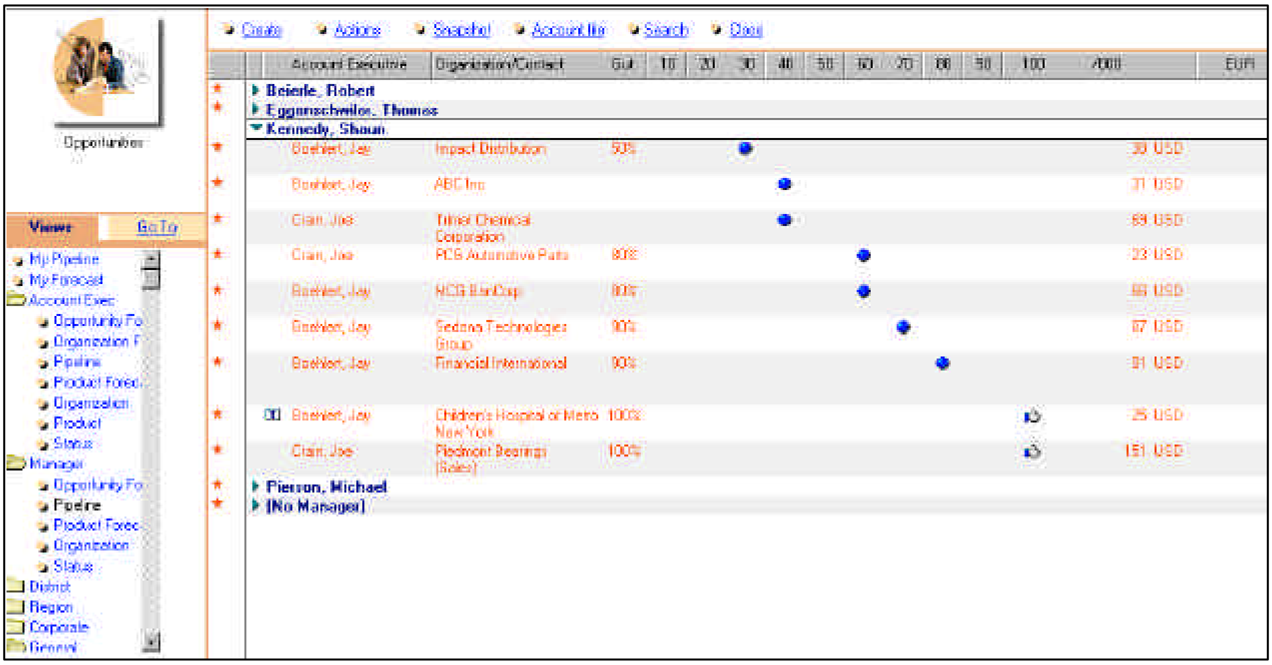
Account information

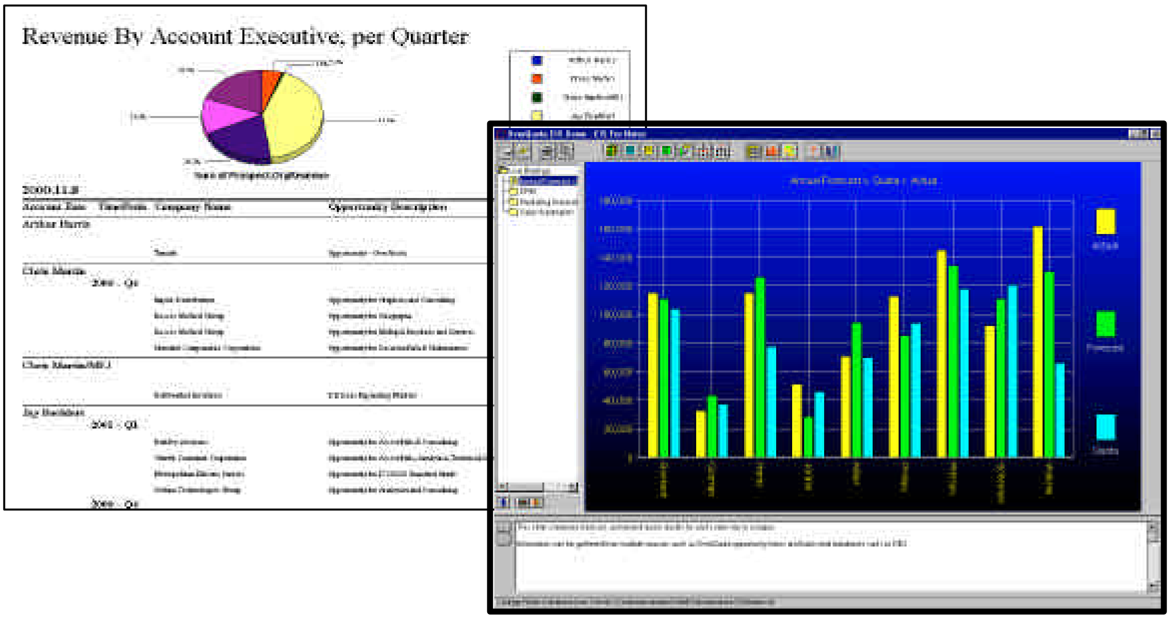
How easy is it to get a 360 degree overview about what was/is going on at a specific customer? eSales keeps customer information at your fingertips. The account information delivers all information about a selected customer, subdivided into opportunities, projects and activites. Users can easily select a specific business to get all related activites as well as related details.



Opportunity management

Another highlight that eSales offers is the integrated opportunity managment. It helps both the account executives and sales managers to keep overview about their opportunities. Whether it is a deal with an existing customer or new prospect, eSales allows to configure sales cycles that are specific to the companies needs. As a result of opportunity managment, pipeline managment, forecasting, and sales performance measurements aren't wishful thinking any more.





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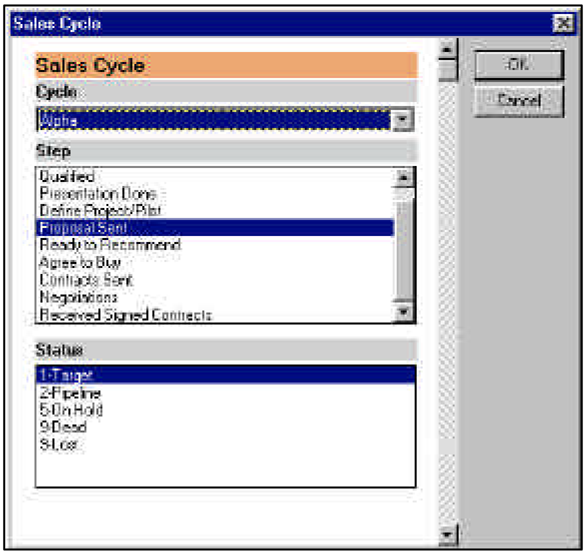
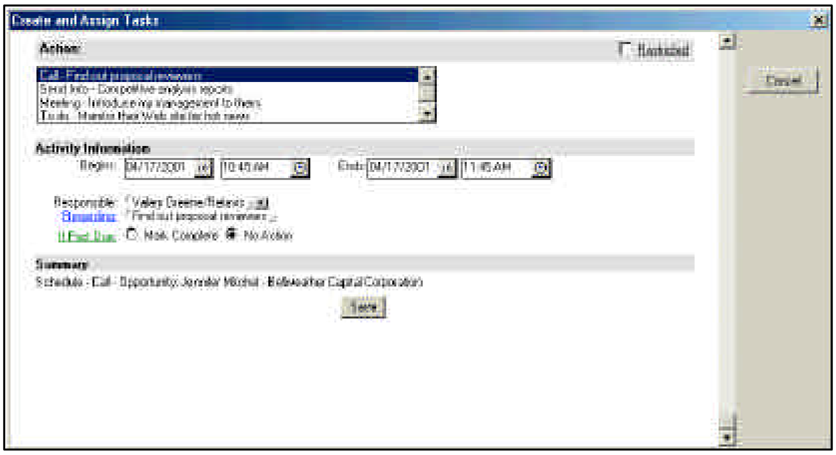
Implement a formal sales process

Existing sales processes can simply be adopted, without any programming, and you can define as many sales cycles as you want to set up.

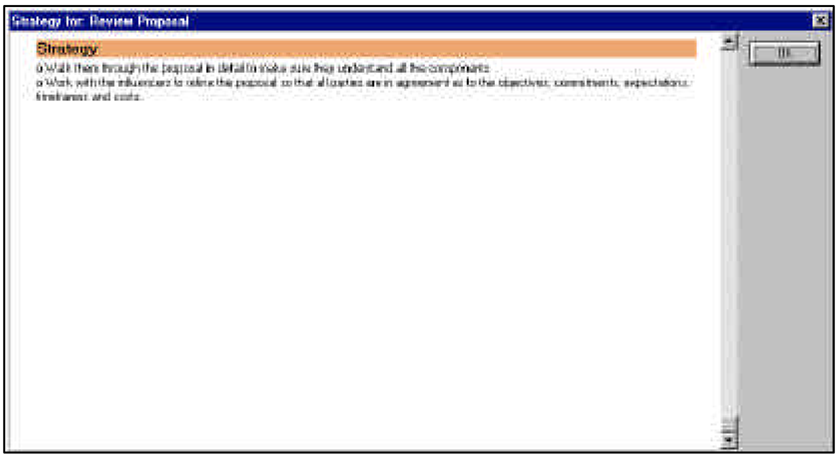


A sales cycle consists of subdivided steps as it is shown to the left.



Furthermore, typical activites can be defined for each of those steps. This helps ensure that needed activities will be done at the right time by the right people.

Those activites will also be visible in the calendar.



The whole sales cylce comes complete with integrated coaching information, so new sales people are able to get access not only to the process but also to additional information that might be sales policies, checklists, instructions, or recommendations.

eSales Feature

Contact Management

Contact and Organization Profiles

Full profile of all organizations and contacts, including 3 address lines, personal information, positions and relationships within and between companies, and custom categories.

- Allows for multiple contact relationships from different organizations. For example, an Opportunity or Activity can include contacts from other organizations.
- Related documents update. Allows you to update related documents without leaving the current document (e.g. from an Opportunity a user can update a contact profile without leaving the current Opportunity
- Organization Charting tool that can be initiated from the Organization directory. This will allow a user to display in a hierarchical chart how people in an organization are formally related to each other. The Chart is available on the Web as well as for the Notes client. Contact can be added and data can be updated from the chart.

Contact History

A dedicated area of the system tracks all correspondence, physical or electronic with automatic time stamps, and can sort by date, contact, subject, type and topic.

Account Management

Activity History

All activities, including correspondence, meetings and calls are categorized by organization, contact and opportunity and include a log of involved personnel and dates.

Relationship Management

eSales allows you to adopt a strategic view of your business relationships that serve unique needs (in a distinct approach from opportunity management).

- Manage relationships around profiles, with customer-defined "rules of the game".
- Manage activities around relationship profiles, and use them as a basis for measuring performance
- Categorize customers by similar groups, and manage their "portfolios" for enhanced sales and marketing opportunities, as well as profitability.
- Fully develop the "Share of Customer" concept, which serves as both an advanced sales tool and measure of customer value to an organization.

Lead and Opportunity Management

Capture leads directly from the web and other sources via data entry or import. Work with lead until qualified then move into opportunity manager

- Agent will convert lead form to an opportunity form and move corresponding activities for complete sales cycle tracking.
- Mass correspondence can be run against leads as well as opportunities and contacts.
- Use the powerful scripting engine to generate scripted questionnaires to capture information from leads or other processes.

Every opportunity includes projected close dates, revenues, likelihood of success, status and sales cycle step. This information is used for advanced pipelining and forecasting at all organizational levels.

Track any number of independent sales cycles which can be modified continuously across an entire sales force.

- Generate and assign tasks or activities related to a user defined step in the Sales Cycle.
- Supports Margin calculation per product sold. Reps can see their margin while working with or creating an Opportunity.
- Supports price editing/revisions while working with or creating an Opportunity.
- Tracks reasons for lost deals and the competitor it was lost to.

Flexible Product/Service Forecasting

Record and track different closing and payment dates – for one or more products or services – on a single Opportunity Profile. This allows for comprehensive forecasting of revenue by product over time.

Sales Cycle Analysis

All leads and opportunities can be sorted by cycle step, status, likelihood of closure and even elapsed time for each stage.

- Allows management to shorten sales cycles and analyze effectiveness of individual account executives and lead sources.

Competitive Analysis

Each account captures information on competitors and key issues, which allows for advanced win/loss analysis. Additionally, an integrated discussion database allows mobile associates to share successful strategies and marketing to more effectively support the field force.

Order Entry

Each opportunity allows products to be chosen from a database and added to an order.

- eSales has a product pricing approval process. Before being made available, product pricing must be approved.
- eSales will link with existing order processing systems to handle the back end processes.

Order History

Link with your existing ERP or back office systems to track and update purchase behavior for each of your customers.

Selling Methodologies

Easily customized to incorporate forms/processes from commercially available (e.g., Holden, Miller-Heiman, Spin Selling) or custom sales methodologies.

Optional Version Supports Target Account Selling (TAS)

TAS is a comprehensive selling methodology from Target Marketing Systems, Inc. For sales organizations that use TAS, there is a version of eSales where the complete TAS Opportunity Plan is incorporated into the eSales Opportunity Profile, including the graphical Organization Map.

Sales Force Management

Territory Alignment/Assignment

Accounts and opportunities are managed individually or in batch mode, and each assignment automatically generates e-mail notifications and activities.

Activity Reporting

All activities, including correspondence, meetings and calls are recorded along with date, time and participants and is available to management and team members to improve cooperation and present a unified face to customers.

Automatic Roll-up

All elements of the system employ the inherent Domino capability to present individual data at any organizational level. Each member of the company receives only the information that is deemed appropriate for that layer.

Special Events Tracking

Generic elements of the system can be used or existing features can be customized in to meet specific needs

Time Management Tools

Single User and Group Scheduling

Lotus Notes Calendaring & Scheduling Module is fully integrated with eSales. Activities created in the eSales system are reflected in user or team calendar. Transparent link to enterprise wide Notes Calendaring and Scheduling for communicating with non eSales population.

e-Mail, Calendar and Task Integration

Fully compatibility with Notes Mail Task management, as well as integration with PDA. Also compatible with Lotus Organizer GS.

To-Do Lists

Built into the activity tracking module

Fax/Modem

Includes mass-fax and mass e-mail document merging capabilities.

Transaction Log

Includes time/date stamp and can track changes in user-defined fields.

PDA Integration

You can easily keep information in synch between eSales and a PDA.

Tickler/Alarm

All activities use recurring e-mail notifications as reminders. Conditions and frequency are configured by user.

Knowledge Management

Use eSales to search other Notes databases, Web sites, non-Notes databases, and even file systems.

Sales Library

Establish a corporate knowledge warehouse, searchable by the terms you define, to give easy access to sales, marketing, product, and support information.

- Provide customers and partners with the timely and accurate knowledge about your company and products with automatic document publishing from each of the knowledge components to your Web site.
- Ensure controlled, targeted publishing of knowledge to selected audiences.

Expert Q&A

Automatically route questions to experts you define to provide timely and accurate answers. Previously answered questions serve as a FAQ knowledge base.

Expert Q & A features within eSales integrates with Lotus SameTime to allow users to instantaneously reach people and get information that they need when they need it.

Team Discussion

Facilitate discussions among eSales users with Team Talks.

Telemarketing/Telesales

Call List Assembly

Includes date/time and priority and assignment tracking.

Scripting

Use the powerful scripting engine to generate scripted questionnaires to capture information from leads or other processes.

Call Recording

Conversation log with time/date header on every call.

Call Statistics/Reporting

Several views, all customizable, to show stats. Quick custom reports with Crystal Reports.

Marketing

Product/Price Configurator

Simple solution in the core product. Pulls options from product table and includes ability to calculate discounts, totals, margins. Product table can be centrally managed. Multiple currencies supported.

Campaign Management

Track the planning details and success of your marketing campaign; from generating telemarketing scripts to closing the deal.

Sales Library

Allows rich text objects such as presentations and spreadsheets to be stored and can even be published directly to the Web

Competitive Information

Information can be managed in the Sales Library. Also culled from day-to-day activities based on field observations. Spot competitive trends by product, region, rep, etc.

Letter Writing Capabilities

Fully functional word processor is included. Letter templates can be stored to expedite common letters. Integrates with MS Office.

Mass Correspondence

Comprehensive mass correspondence manager, that includes the ability to “fastpath”, sending first to e-mail, then to fax, then printed, depending on available information on each user. This is unique to eSales.

Correspondence Log

Centralized log of correspondence campaigns, and shows as an activity for contact, customer, opportunity, relationship, etc., depending on where it was initiated.

Label Creation

Included in the mass correspondence component.

Tracking of Mailings

Tracks mail, fax and e-mail campaigns by date, subject and recipient.

Executive Information

Pre-defined Queries

Uses views in Lotus Notes. Also delivered through stored queries.

Ad hoc Query Generator

Built-in query engine.

Analysis Tools

eSales incorporates eSuite into the core product, which will enable on-the-fly graphical trend analysis. eSales ships with 80+ pre-defined reports viewed through Crystal Reports run-time version.

Integration with ShowBusiness EIS™ for Data Analysis

Information stored in eSales Opportunity Profiles and Log documents can be queried, “sliced & diced,” and then presented graphically using ShowBusiness EIS (Electronic Information System).

Forecasting/Planning Tools

Built into opportunity tracking module.

Other Types of Reporting

Exporting to external spreadsheets, databases or any other ODBC compliant reporting tools.

Internet Browser-Based Access to the eSales System

From an internet browser, you can view and edit all data that is stored in eSales. You can also create eSales documents. Most functions available in the eSales Notes client are available from an internet browser, including:

Same “look and feel” as the Notes Client, including:

- Personal Page
- Navigation
- Views
- Document Creation, Viewing and Updating
- Calendaring and Scheduling
- Emulates “Quick Search” function when finding entries in a view
- Profile Selection (for Organizations & Contacts)
- Keyword dependencies
- No need to refresh page after selecting the first of several keywords

Some areas of functionality within an internet browser are not yet available:

- Running Agents from Views
- Mass Correspondence

- Drag & Drop Functionality on the Calendar
- Some User Configuration Options

Globalization

Multiple Languages

Product ships in French, German, Italian, Japanese and Spanish. Translate into any other language using the Domino Global Workbench.

Currencies

Save time with multiple currency support with automatic conversions to your and your users' preferred currencies.

International Adress Format

Support every country you do business in with configurable address and date formats.

Personal Page

Allows user to have important information regrouped in a portal page from anywhere in the system. The page can include list(s) of Activities, scrollable Forecast information, latest News information, Ticker information, email, etc..

- User default preferences. When a user does not have a user profile defined, a Default user profile is available.
- Notes client is "browser-like" in look and feel, including underlined blue text to show hotspots. Use Notes or Web. Or both. The choice is yours.
- Let users configure eSales navigation tools to work the way they work.

Technical Specifications:

Operating Systems

Windows, Macintosh, OS/2, Linux and UNIX. Multi-Platform Support for IBM Systems, including iSeries, pSeries, xSeries, zSeries

Network Operating Systems

Windows NT, Windows 2000, OS/2 and Netware

Software Programming Languages

Lotus Notes, Lotus Script, JAVA, JavaScript, HTML, DHTML

ERP Integration

eSales includes a comprehensive set of tools to retrieve, analyze and update data from ERP tools..

SQL Supported

Links to all SQL servers, such as Oracle, SQL Server, DB/2 through integration with commercially available third party integration tools.

OLE supported

Fully, and in all documents.

System Maintenance

- A Structure Database allows for cross references of eSales databases, fields, forms, views, agents, sub-forms, etc... Significantly helps developers maintain the system.
- Allows archiving of data across servers - Allows you to archive documents in one database to a database on a different server.
- Use of Lotus script libraries make code maintenance easier

Data Synchronization

Updates key fields throughout entire system after source field changes. User chooses time for updates to occur.

Internet Connectivity

eSales is fully web based

Source Code

Included

Security Features

Roles, responsibilities, restricted fields and encrypted e-mail.

eService

Brief description

The eService application module is designed to meet the needs of organizations wishing to improve their direct customer service. Support teams can use it to record, act on, and resolve customer requests arriving through any of a number of communication channels, including conventional mail, email, telephone calls, web site interfaces, interactive messaging tools, and face-to-face interactions at service outlets. The intended users are first level support agents and their immediate operational management; second level and higher level support personnel; as well as customers themselves.

eService implements a "ticket" based model, where each customer request, support incident or case is recorded in the system under a ticket number. This reference is then used to tie the ticket to all interactions leading to its resolution.

eService allows customers and partners to feel more in control by giving them personalized service from the organization; when they want it and how they want it (web, email, phone, fax, chat). It ensures the same high-level quality experience no matter how they chose to interact with the organization. The only way to improve customer service is to communicate, coordinate and collaborate better with customers and the teams supporting them. The better an organization does this, the greater the guarantee an organization will build long-term loyalty and higher profit margins.

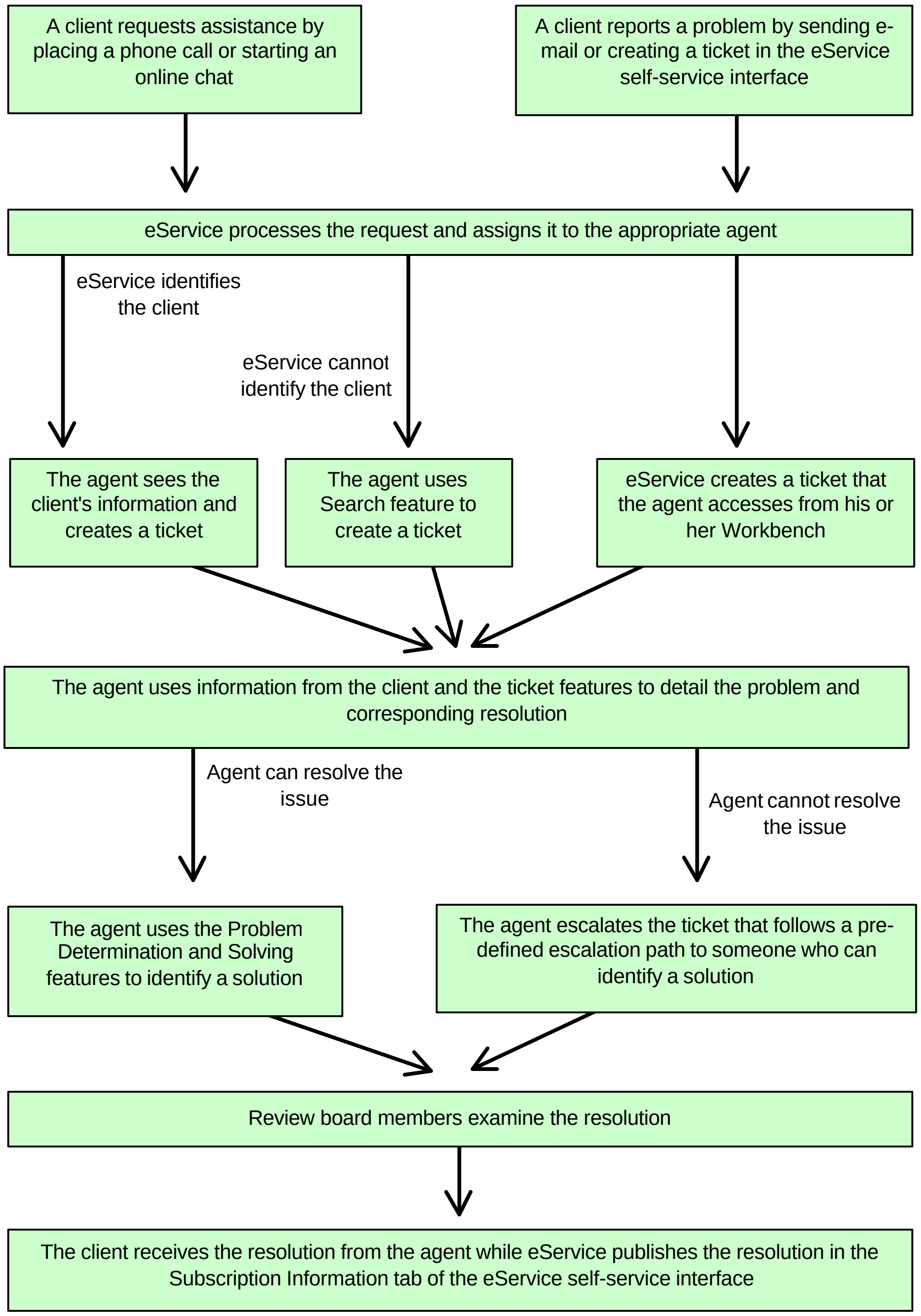
The centralized communications queue allows customer phone calls, emails and faxes to be centrally captured and automatically routed to the appropriate people for resolution. All CRM data is stored in a RDBMS data repository for scalability, reporting and ad hoc querying while instant messaging allows for real time interactive chats and "white boarding". Relavis eBusinessStreams is able to capture all this information, store it in context to people, places or things, distribute and analyze and report on it. People are also able to comment, respond and collaborate on it. All this is essential for achieving CRM collaboration within and beyond the organization.

Areas of focus are Ticket Management and Problem Resolution, Customer Self-Service, Workflow and Escalation, Querying, Reporting and Analysis, Chat and Text Analysis.

Key eService Features and Benefits include:

- Provide a unified customer experience
- Capture and manage all customer interactions, phone calls, web inquires, fax or email in one place
- Reduce cost of call center activities
- Provide customers the ability to solve their own problems
- Tailor service to individual customers
- Real-time web collaboration gives customers immediate access to the assistance they need
- Provide personalized or standard escalation and workflow
- Define and automate all support processes and business rules using a graphically intuitive workflow architect

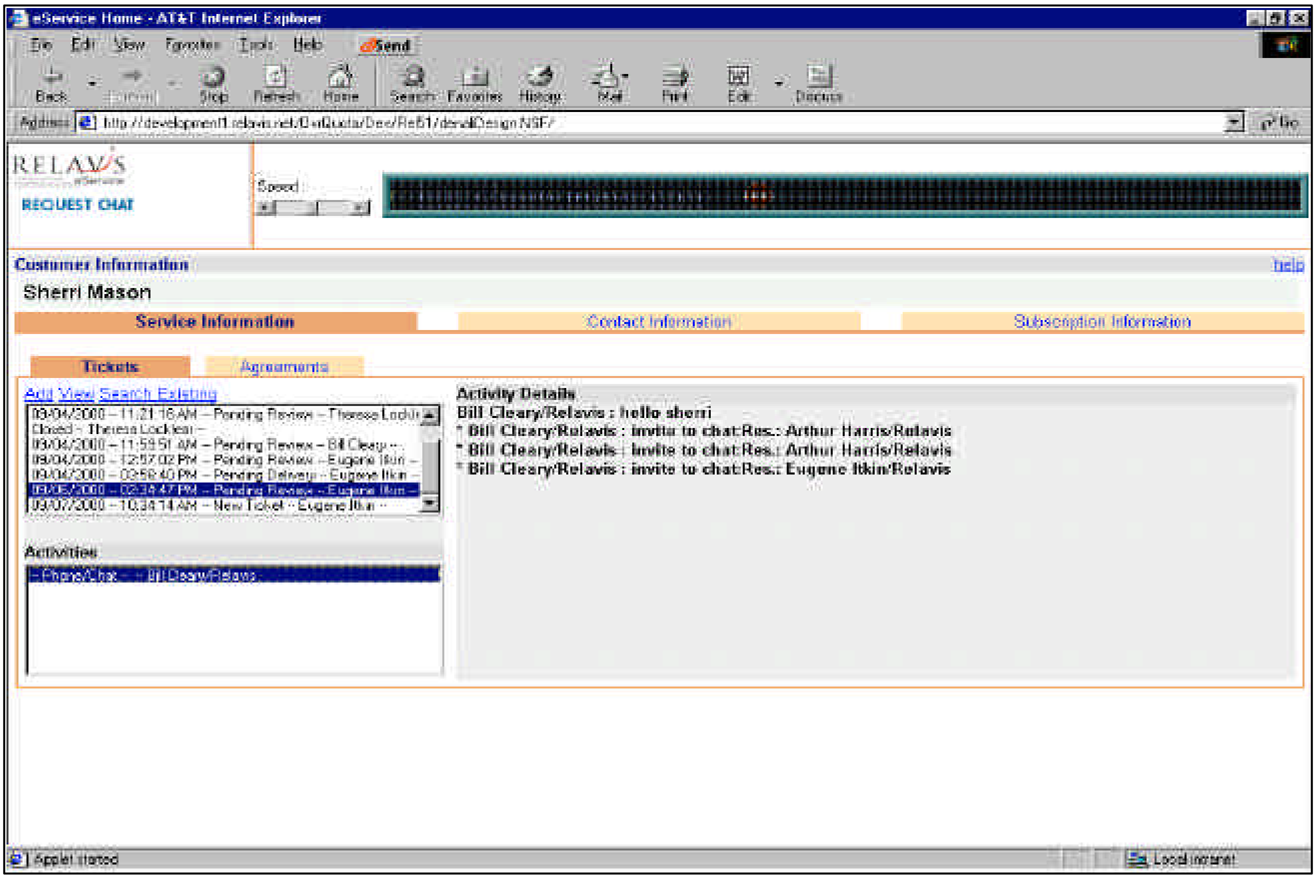
Using eService to Manage and Resolve Client Issues



Screen Examples

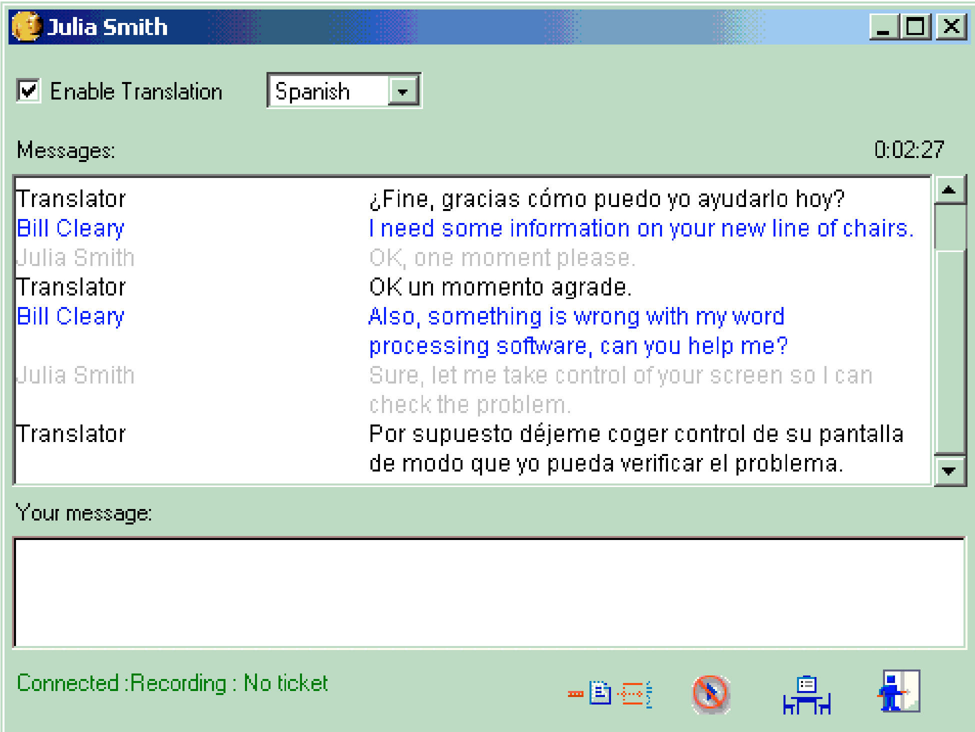
Self Service

Customers, who may be internal or external to the implementing organization, can use the eService self-service web interface to access and optionally update their personal customer information or details of their own support requests. They can also view selected product/service information, so-called subscriptions, that the organization may choose to publish to them.



Instant Messaging

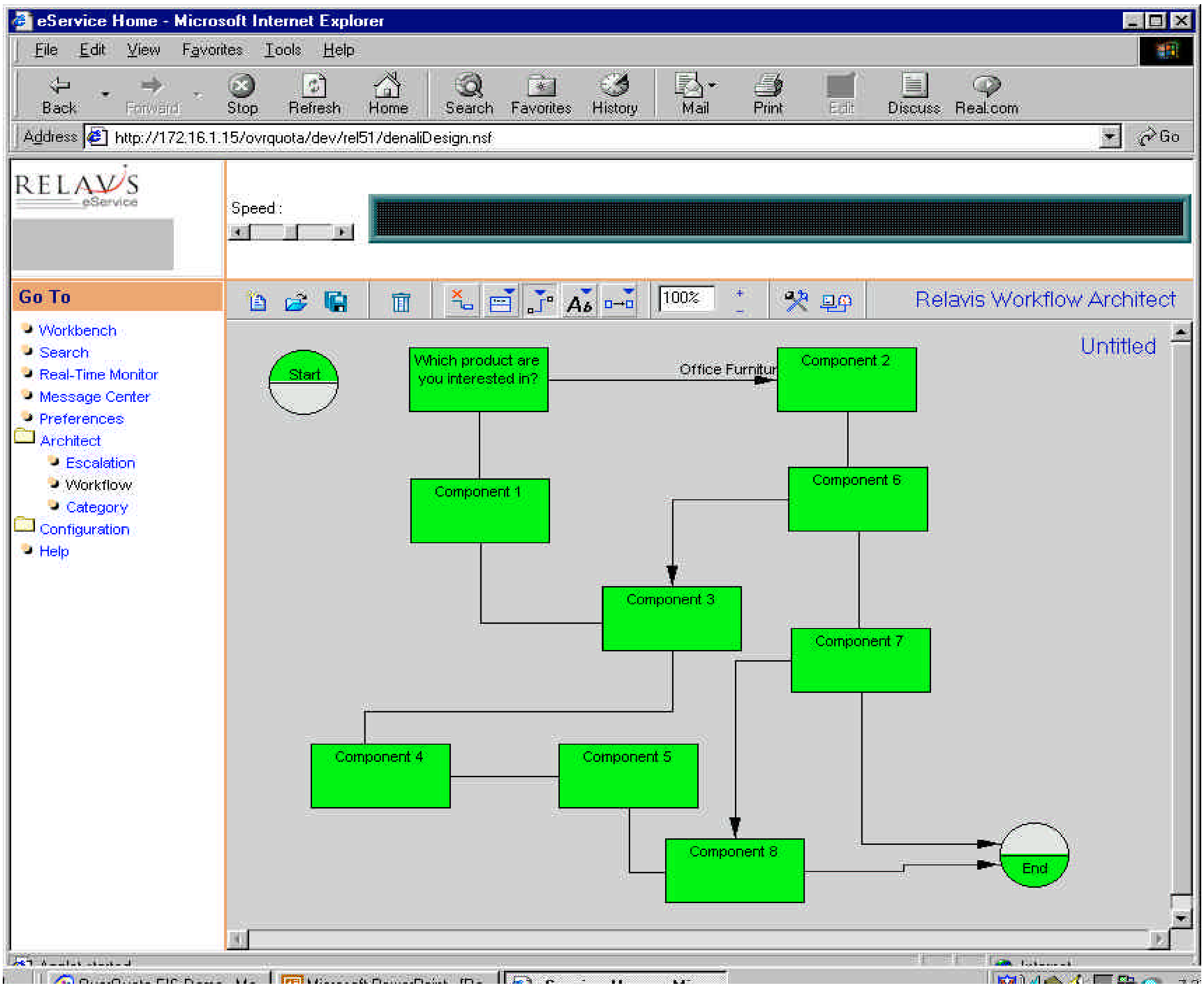
eService includes components that can link to a **computerized telephony** service in order to exploit the capabilities of those systems, such as identification of the source of an inbound call via calling line id; call routing by voice response, touchtone keying, etc. In response to an incoming call, eService will identify and alert the best agent to handle the request based on skills and real-time availability. Where the call source can be identified to an individual customer or company, eService will automatically present the selected agent with the relevant customer record along with the request alert. A similar process of customer identification, agent selection, and dialog initiation takes place when a customer requests **real-time chat** with a support agent from an eService-enabled web page.



Workflow architect

The workflow architect provides a web-based visual programming interface for the definition of two types of process workflow:

- that involving interaction with a user, which Relavis eBusinessStreams calls Front-end workflow;
- that where the system processes some business object or objects without human interaction, which it calls Back-end workflow.



In each case, the Relavis eBusinessStreams manager uses the Workflow Architect to first identify the object or objects on which the workflow is to act, then to define the steps that constitute the workflow.

At each step in a workflow, the system can examine properties of the object(s), modify the object(s), issue alerts or messages to system users, and invoke other workflows or processes. In the case of front-end workflow, text can be presented to user and responses can be collected.

The workflows that are defined can be invoked through a URL syntax or by scheduled Domino agents.

Typical applications for front-end workflow would be:

- Scripting an agent interaction with a customer; for example collecting problem diagnostic information, or guiding the agent through a cross-sell/up-sell process.
- Gathering prospect qualification information from a self-service web site; the resulting set of answers could form part of a sales lead.

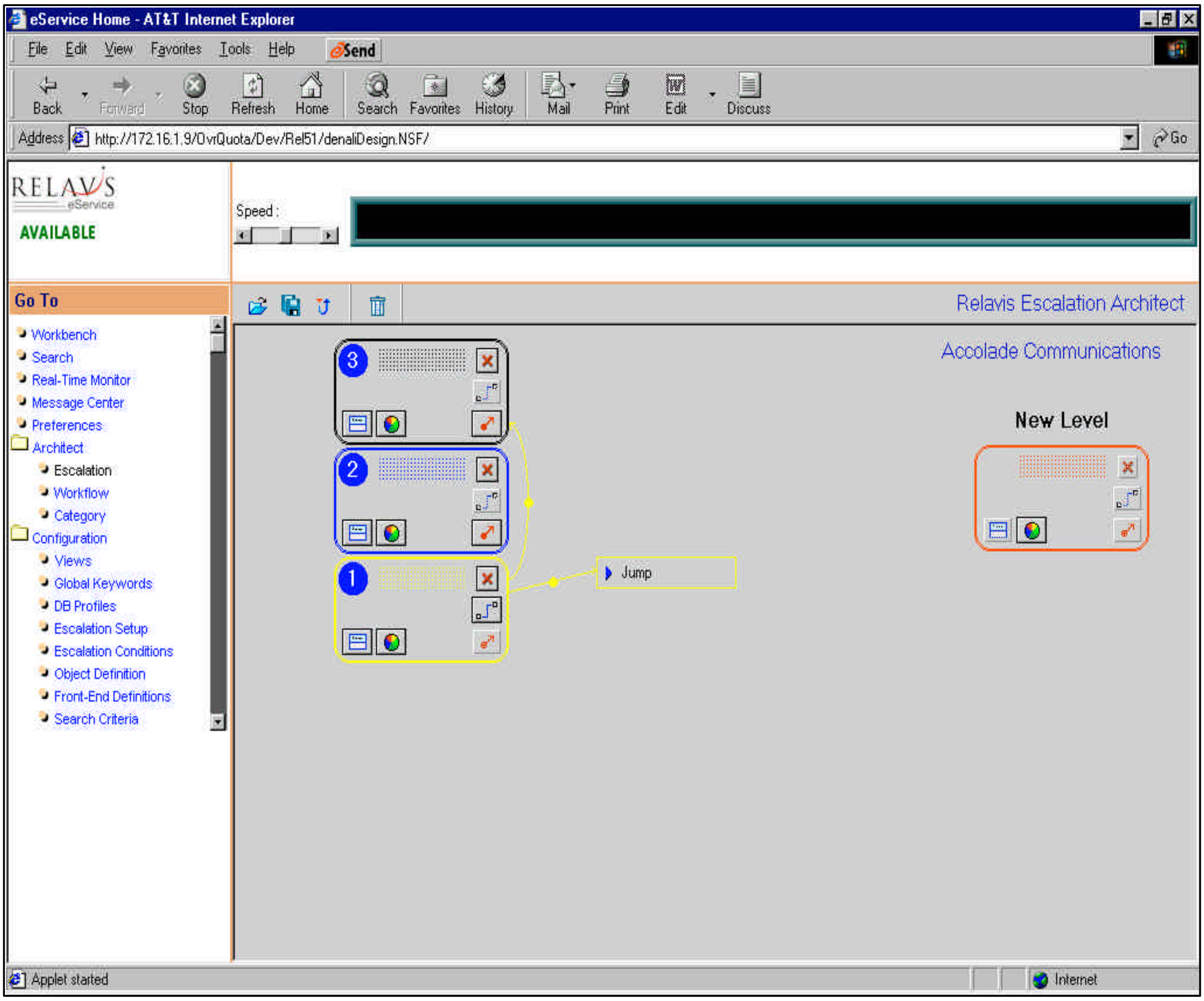
Applications for back-end workflow could include:

- Automatic response to emails, for example, acknowledgement of receipt or confirmation of processing when text analysis returns sufficiently high confidence in its categorization, returning specific information such as price lists, products fixes etc.
- Reporting periodic reviews of open ticket numbers, generation of statistics such as time-to-close, etc. Exception reporting such as notifying management or customers when the handling of tickets falls outside defined limits, automatically notify management, notify the customer, etc.

The Relavis eBusinessStreams workflow is not based on or dependet on Domino.Workflow and while there is a degree of functional overlap with Domino.Workflow, each tool has its own strengths and areas of optimal effectiveness. Each is able to invoke the other, so hybrid workflow scenarios are possible.

Escalation Architect

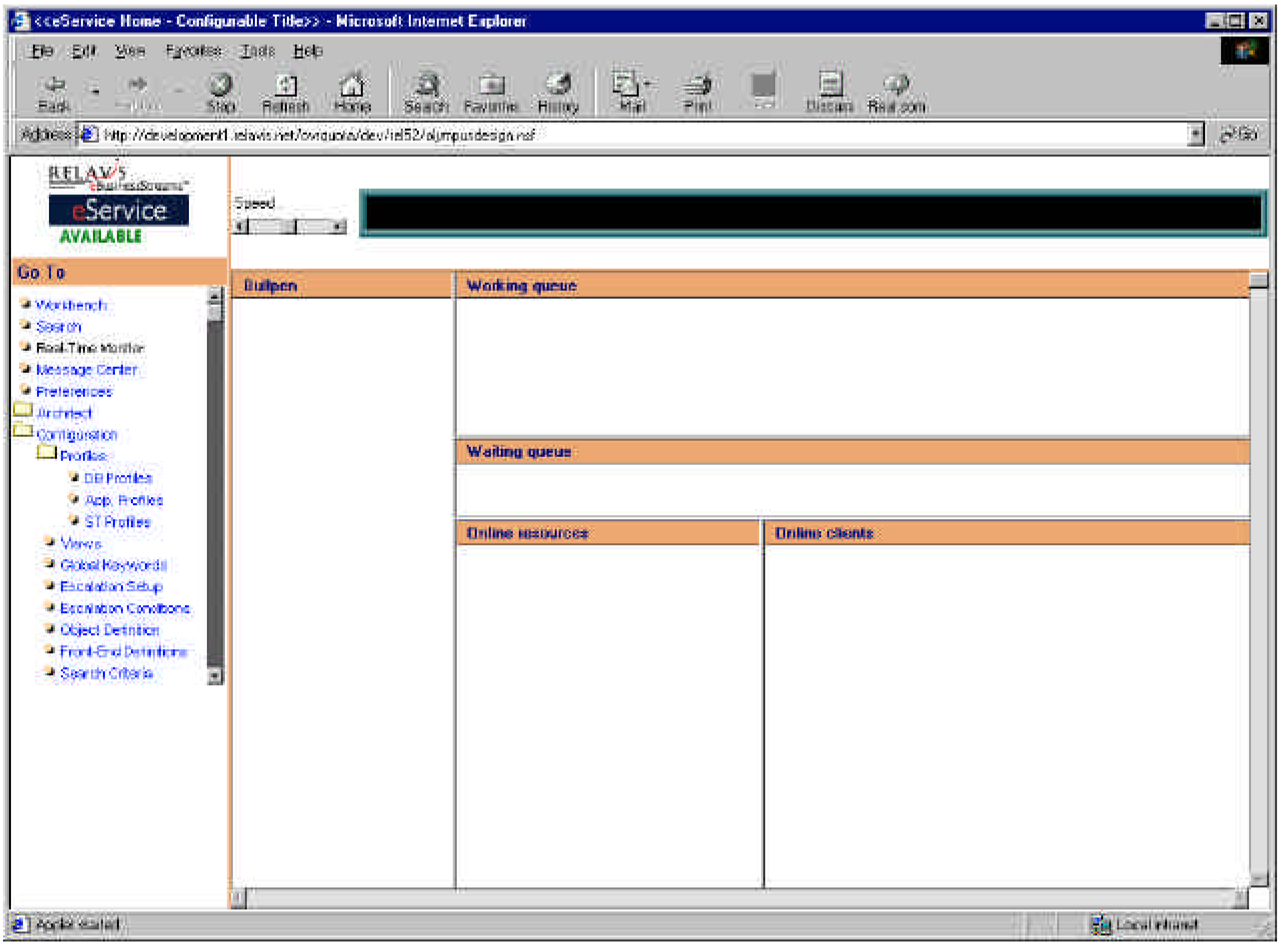
Where the assigned agent or resource cannot immediately resolve a ticket, eService provides facilities to re-assign the ticket to someone who can progress it. As well as a simple hand-off to another named user, eService implements a flexible and configurable **escalation** process that will automatically identify the most appropriate user to be assigned the ticket. At the time of escalation, the most appropriate path is selected automatically, based on the ticket status, problem category, customer identity or any of several other prioritized decision criteria. Within this escalation process, the system can update various properties of the ticket, issue alerts and notifications, or trigger an automatic workflow process. Any number of distinct escalation paths may be defined via a simple-to-use visual programming interface, allowing the system to be readily tailored to match the organization's support policies and service levels, whether simple or complex.



Communication Center

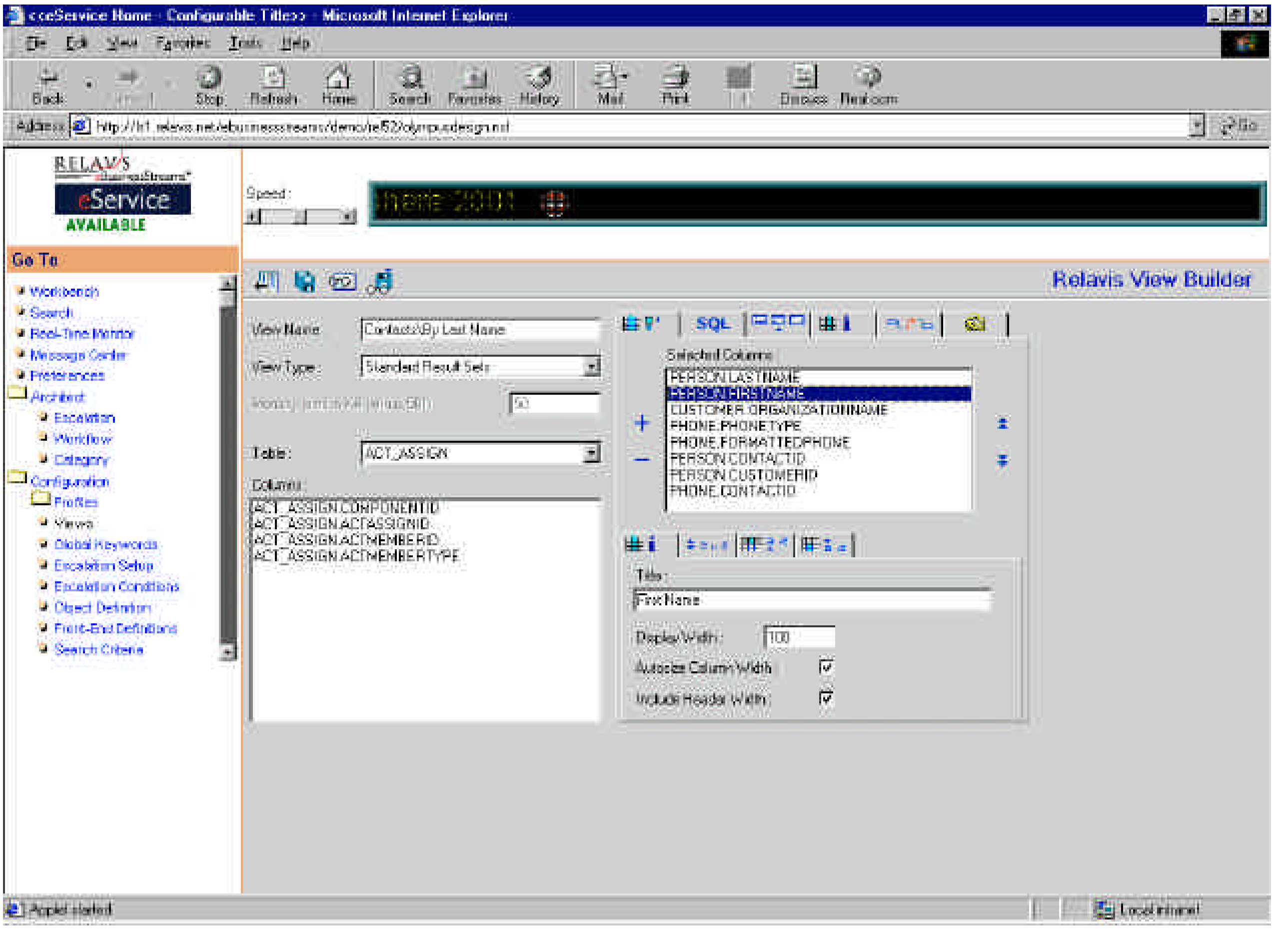
This component serves to connect the user to the application server processes concerned with tracking which users are online, what tasks they are engaged on, and so on. Through the Communications Center, the Relavis eBusinessStreams Unified Communication Queue Manager is aware of the users who are online and their activity status. Managers can see this reflected through a Real Time Monitor display. The Communications Center also provides a platform for launching interactive chat sessions.

The Communication Center is involved in selecting which agent should be alerted for an incoming call or chat, based on skills (where the customer is known and the necessary skills can be determined), availability, queue depth (i.e. how much ticket work the agent has outstanding at the time), and time since last call. It alerts the selected agent via a pop-up window (launched by the Communications Center applet); the agent has a short time within which he must accept or reject the request by clicking the appropriate button on the popup window. If he fails to respond within the required time, he is automatically switched to "inactive" status. The Unified Communication Queue Manager tries other available agents until one is found who accepts the request.



View Builder

Relavis eBusinessStreams includes ViewBuilder, a component that consists of Java applets that allow managers to define views of relational data in a very similar way to that in which Notes programmers define views within Notes/Domino applications. All the usual Notes view features such as column definition, sorting, and categorization are provided, together with ways to specify what actions can be taken on selected rows (such as opening a display of the relevant information). Optionally, ViewBuilder can be used to access any relational data store, not just eBusinessStreams data.



eMarketing

Typically, marketing solutions integrate ten key technology components:

1. Customer information repositories
2. Campaign management
3. Decision Support (DSS) tools
4. Analytics
5. Triggers/passive workflow
6. Process automation/aggressive (active) workflow
7. Back-office links/forecasting
8. Channels (e.g., the Internet, direct mail and POS)
9. Electronic/physical collateral (content) management
10. Knowledge management

While most vendors are providing this common set of components in one form or another, the real difference is in the marketing approaches used to deploy them. Most e-marketing packages today present relationship-based CRM as a blend of traditional segment and database marketing with personalized email and Web pages.

Relavis eBusinessStreams eMarketing component includes these capabilities for traditional marketing programs, but also offers a Relationship Marketing approach that is consistent with Collaborative CRM. This allows organizations to identify and create new value with individual customers, then share the benefits over the life of the relationship. It helps organizations focus and manage the ongoing collaboration needed between organizations and their customers.

eMarketing automates targeted and personalized multi-channel marketing campaigns. It drives collaborative interaction between everyone in the marketing and relationship cycles, including customers and channel partners. This collaborative approach allows an organization to address its customers' specific needs, while focusing on the highest returns for the effort. The customers receive continuous added value, thus ensuring higher revenues. Areas of focus are Lead Management, Campaign Management, Knowledge Management and Data Mining.

Key eMarketing Features and Benefits include:
- Collaborating with customers directly to develop marketing programs that support their priorities & needs
- Developing a clearer understanding of marketing effectiveness
- Collaboration encourages more customer confidence, trust and their personal stake in the relationship – all essential for building customer loyalty
- Get the complete view of each relationship – the company's and the customer's
- Communicate with customers the way they want
- Identify and focus on the highest return customers
- Generate new opportunities from all sources

eMarketing will help to generate new value for customers by recognizing the role they play in defining the very value that they want. Through collaboration, value is created with customers, not for them.

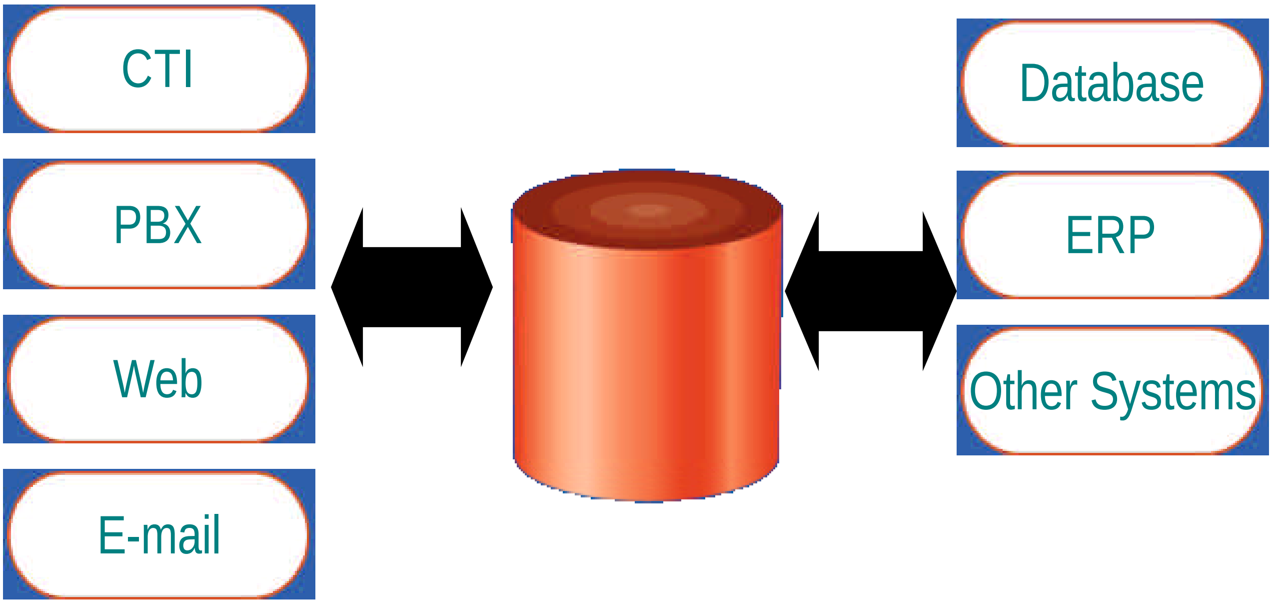
eBusinessStreams Architecture

High Level Conceptual Design

Many organizations require a CRM application to interact with many different systems; from back office transaction processing and financial systems to legacy front office solutions that already cover some of the functionalities provided by eBusinessStreams.

The picture below, on the left side, shows the various communication paths which are already in place. The right side represents the different back-office applications which are also in place. Finally, the middle represents Relavis eBusinessStreams as the „CRM clue“.

What is important to understand is our ability to **integrate** existing systems, because integration of ERP systems requires the ability to access on relational databases. All line-of-business data is held in the relational data store.



Relavis eBusinessStreams provides a modular approach to manage, and deploy a collaborative Internet-based CRM solution. Our framework provides a set of components specifically focused on sales, marketing and service & support processes, using open, standards-based Java and Enterprise Java Beans. This facilitates true extensibility and scalability of the Relavis eBusinessStreams logical 3-Tier process-driven architecture through the provision of modules that can easily access information from other applications and vice-versa. Coupled with a powerful set of tools that separate the development of business logic from application logic, the Relavis eBusinessStreams constitutes a comprehensive environment for the quick development and deployment of a complete collaborative CRM solution.

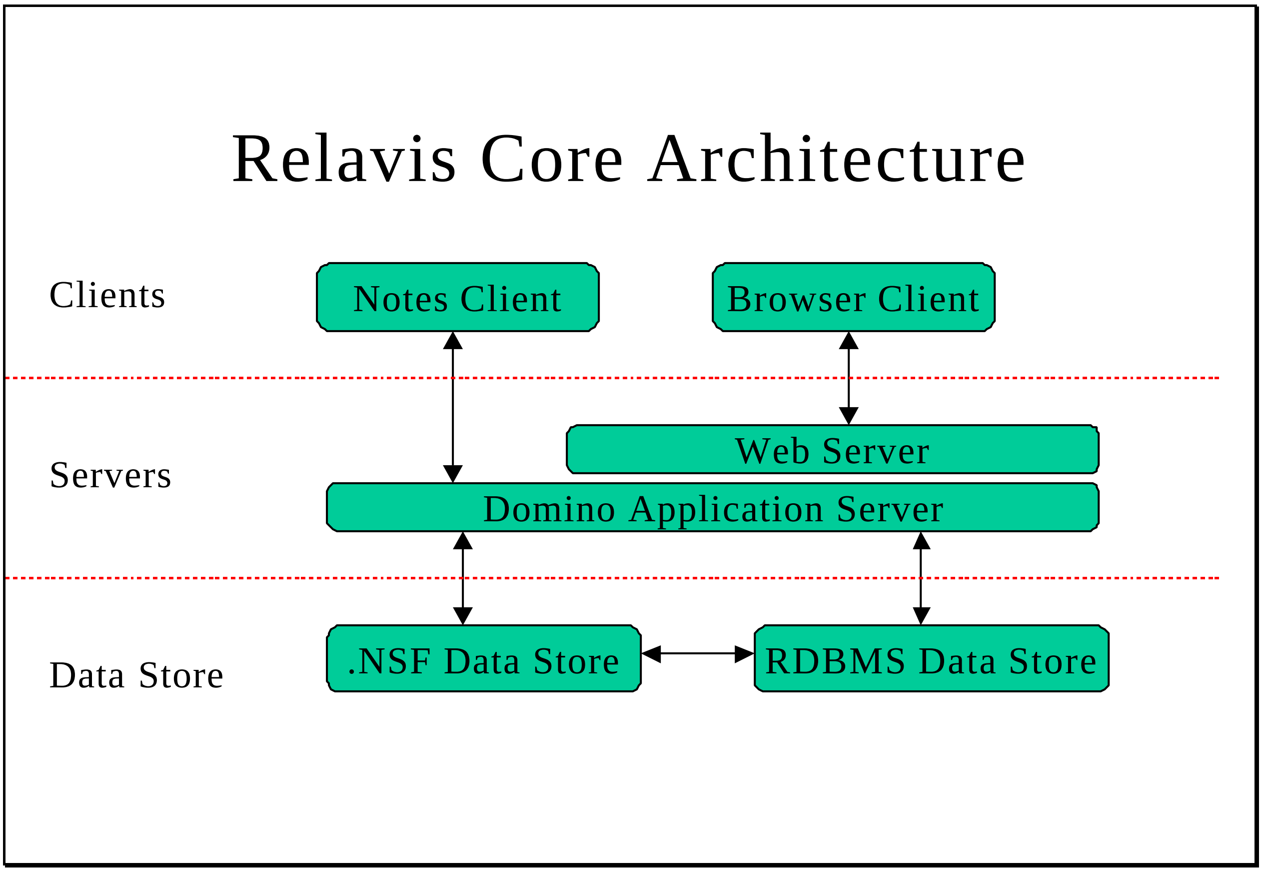
While the Relavis eBusinessStreams applications are developed in Java, Domino continues to play a key role in its architecture. One key issue in the setup of any web application is the manageability of the various aspects that typically are required to completely form the web application itself. Relavis utilizes Domino as a powerful machanism for sturcturing and deploying these applications. Whereas in most web environments, critical issues such as 1) security, 2) replication, and 3) messaging/collaboration have to be accounted for as explicit design points, Domino allows the concerns around these issues to be centred on the needs of the business process rather than on the technical constraints.

Building upon the Domino platform enables Relavis eBusinessStreams to leverage and expand upon the many unique benefits that are central to the Domino environment.

- Collaborative Workflows
- Mobile User Support
- Integrated Replication & Security
- Web Application Development & Deployment
- Configurable integration with RDBMS & ERPs
- Open Industry Standards: XML, Java, CORBA
- Cross Platform (OS/Hardware) Support

Relavis eBusinessStreams has been designed to meet the needs of those business operations that require collaborative processes in their customer facing operations. These collaborative processes typically occur in business models that involve multiple people and organizations in the sales and servicing processes.

Core Architecture



eSales is built upon a traditional Domino architecture, providing built in support for mobile and networked users across a variety of platforms. Client side access to the application can be through either a Notes 5.x client or a web browser client with DHTML support (IE 5.x). Either client uses the same interface with a high percentage of the code stream (>70%) common between the clients.

On the server side, eSales is a pure Domino application, built in Java, HTML, DHTML, Javascript, and Lotuscript. All data is stored in the standard Domino .NSF data files; which provides seamless replication to the remote users.

eService is also built on the Domino platform; but leverages additional technology provided by Lotus & IBM to provide a more robust environment for contact center support. Due to the connected nature of service center users, eService can only be accessed through a standard browser client. Domino is the primary application server, serving up HTML, DHTML, Java, and Javascript to the customer's chosen web server; which can be any open standards web server, such as WebSphere, BEA, or Netscape. The primary data store for eService is any RDBMS supported by the Lotus/IBM connectors. Currently, the eService customer base is equally split between DB/2 and Oracle environments. These connectors allow eService to easily interact with a variety of data sources, including most standard RDBMS, ERPs, and Notes.

Integration between the two modules occurs at two levels: process and data:

Process level integration is seamless, as both applications run on the Domino platform and fully leverage workflow and collaborative features. Processes can be initiated in either module and then shared with users from the other module using our workflow architect.

Data integration is accomplished either via XML or Domino tools, such as Lotus Enterprise Integrator, enabling a single Customer Database stored in the RDBMS.

In our next major release, eSales will add the option to work with a relational backend for server-based users. This will enable organizations that use the full suite to have network-based eSales access data directly from the RDBMS and only push those items that mobile users need into the Domino data environment.

Integration with other systems

Many organizations require a CRM application to interact with many different systems; from back office transaction processing and financial systems to legacy front office solutions that already cover some of the functionalities provided by eBusinessStreams.

Integrations can be handled in the following ways:

- Object or Data element level read/write using Lotus/IBM Connectors
- XML
- CORBA
- Data loads and Synchronization

The connectors provided by IBM and Lotus enable Domino applications to read and write to various RDBMS and ERPs using the same API layer and security as native calls. For example, the SAP connector ensures that all interactions use defined SAP interfaces (BAPI or RFC) rather than direct updates to the data store. This ensures the integrity of the backend application. Configuration documents allow Domino developers to map to the appropriate backends and functions without having to write to the specific application.

XML provides a standard interface for all compliant applications/platforms to easily share data. One example of this interface would be an analytical CRM application performs data analysis against the central customer data repository and then builds a group of contacts that need to be run through a marketing campaign. After generating the campaign, the analytical tool passes the dataset through XML to Relavis to be included as part of the contact history. Additionally, any outbound calls can then be queued up in the service center to be assigned to available agents.

The Domino platform enables Relavis eBusinessStreams to act as either a server or consumer of information in the Common Object Request Broker Architecture (CORBA). Individual elements, such as a customer request, can be packaged as an object and then distributed to other CORBA compliant applications.

Finally, the Relavis Workflow Architect enables organizations to define workflows for any front office process. These processes may frequently require interaction with other systems in an organization. At each step in the workflow an interaction with another system can be defined. This may be through a predefined operation, such as create an order, which uses the IBM/Lotus Connectors; or it can be through a Notes agent or executable file that leverages any one of the other integration methods. The executable file also enables an organization to use previous batch or command line interfaces that have been developed against older legacy systems.

Contacts

Please contact your Relavis representative to discuss how Relavis eBusinessStreams can boost your bottom line.

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