

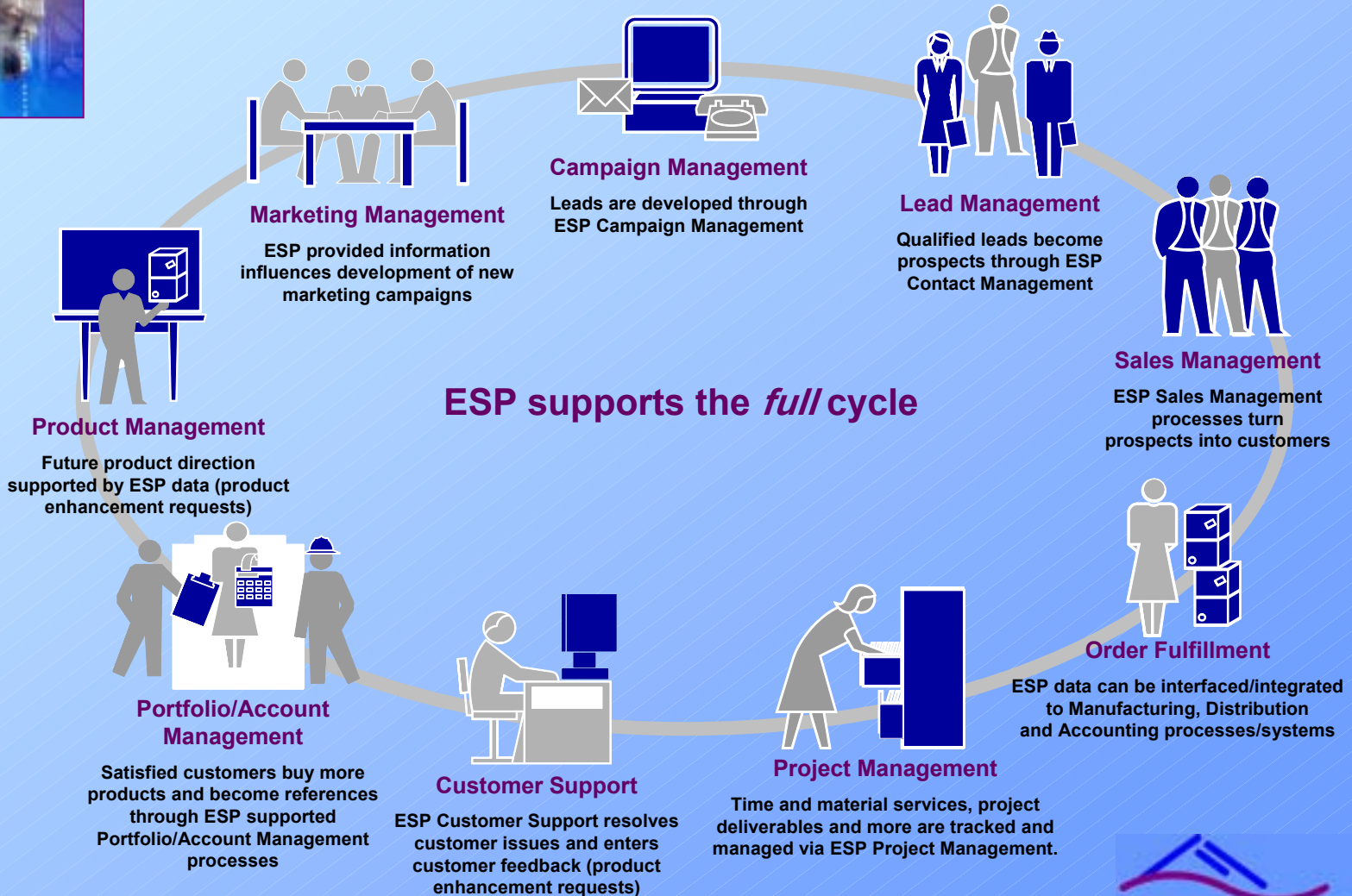


ESP 4.0

Expert Support Program
an Enterprise CRM Solution

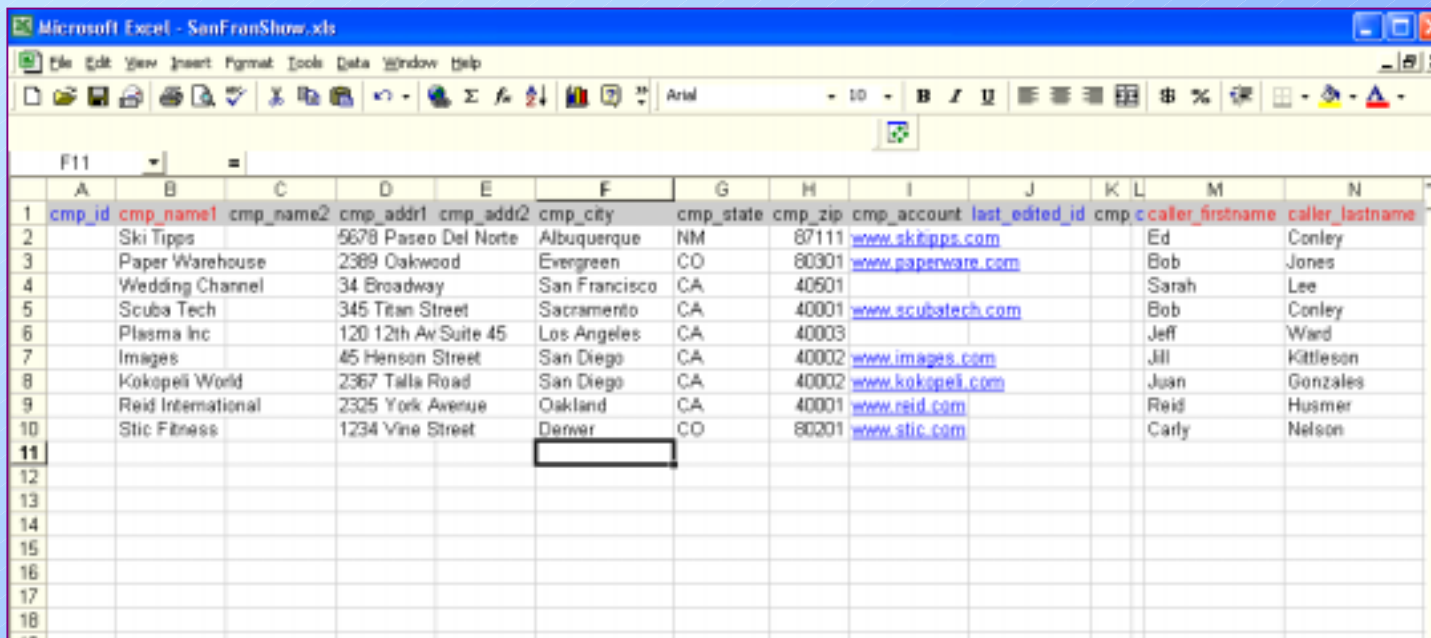
*Taking Customer Management
to a Higher Level*

Customer Management Cycle



Campaign Management

Easily and quickly import campaign targets (potential customers) into ESP from an Excel spreadsheet



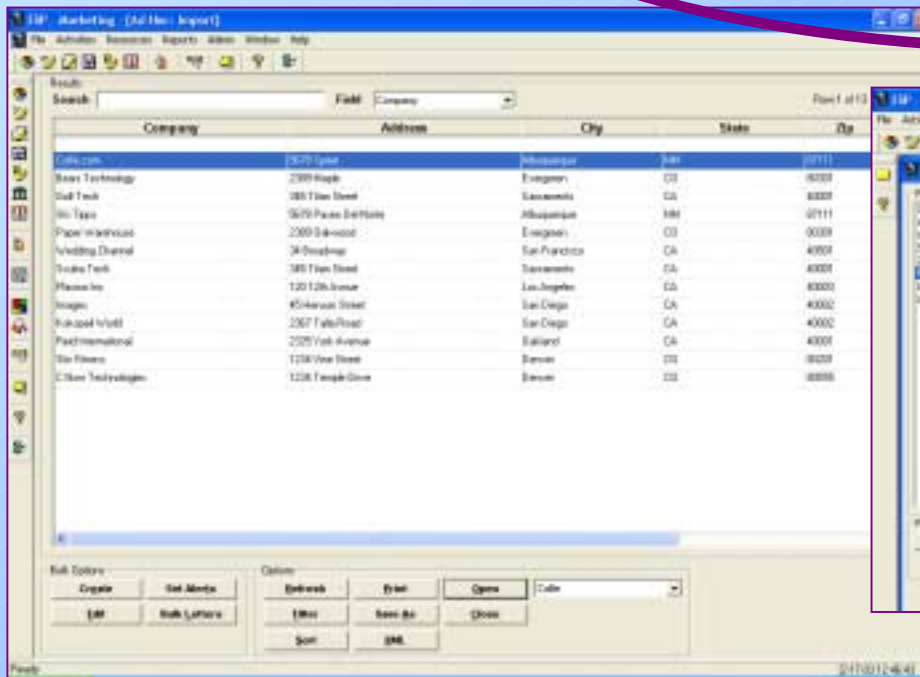
The screenshot shows a Microsoft Excel spreadsheet titled "SanFranShow.xls". The spreadsheet contains a table with 11 columns and 11 rows of data. The columns are labeled as follows: cmp_id, cmp_name1, cmp_name2, cmp_addr1, cmp_addr2, cmp_city, cmp_state, cmp_zip, cmp_account, last_edited_id, cmp_c, caller_firstname, and caller_lastname. The data rows contain information about various campaigns, including their names, addresses, cities, states, zip codes, account URLs, and contact information.

1	cmp_id	cmp_name1	cmp_name2	cmp_addr1	cmp_addr2	cmp_city	cmp_state	cmp_zip	cmp_account	last_edited_id	cmp_c	caller_firstname	caller_lastname
2		Ski Tipps		5678 Paseo Del Norte		Albuquerque	NM	87111	www.skittips.com			Ed	Conley
3		Paper Warehouse		2389 Oakwood		Evergreen	CO	80301	www.paperware.com			Bob	Jones
4		Wedding Channel		34 Broadway		San Francisco	CA	40501				Sarah	Lee
5		Scuba Tech		345 Titan Street		Sacramento	CA	40001	www.scubatech.com			Bob	Conley
6		Plasma Inc		120 12th Av Suite 45		Los Angeles	CA	40003				Jeff	Ward
7		Images		45 Henson Street		San Diego	CA	40002	www.images.com			Jill	Kittleson
8		Kokopeli World		2367 Talls Road		San Diego	CA	40002	www.kokopeli.com			Juan	Gonzales
9		Reid International		2325 York Avenue		Oakland	CA	40001	www.reid.com			Reid	Husmer
10		Stic Fitness		1234 Vine Street		Denver	CO	80201	www.stic.com			Carly	Nelson
11													
12													
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Campaign Management con't

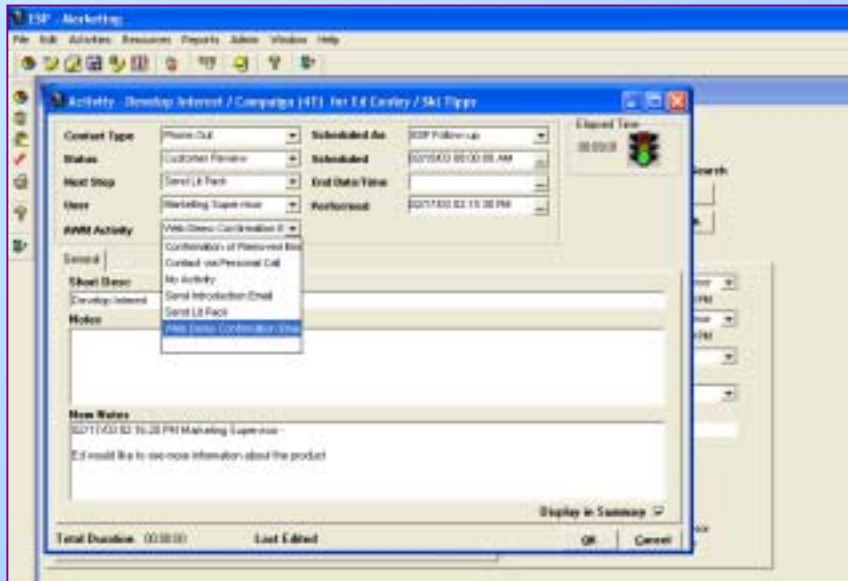
Campaign support features include:

- Set alerts on Caller and Company
- Create marketing *assignments* for personnel
- Print target address labels
- Send bulk letters or bulk emails



Campaign Management con't

Use AWM (Automated Workflow Management)
to send emails or print correspondence



Thank you [*caller.caller_firstname*], for your interest in CustomerSoft's ESP software. A representative will contact you shortly.

Please respond to rhusmer@customersoft.com and rate CustomerSoft's ESP Product Tour:

- 1) Excellent
- 2) Good
- 3) Fair
- 4) Bad

Please feel free to add any additional comments you have about the ESP Product Tour to the email.

At CustomerSoft, we recognize that true customer relationship management happens across the enterprise, and we offer products that make this vision a reality for companies of all sizes. CustomerSoft's flagship product, ESP - the Expert Support Program, offers robust simplicity - one customer record, one application, meeting the needs of your entire organization. We've eliminated the barriers that traditionally hinder CRM initiatives, such as complex system integration issues, lengthy implementation schedules and diverse product offerings. All things considered, including price, implementation requirements, and functionality, no other product on the market today offers the value ESP brings.

Best regards,

Reid Husmer
Marketing, CustomerSoft
(800)529 - 4377

Lead Management

Track target/lead contact activities and schedule follow-up actions for self or others

The screenshot displays the ESP Marketing software interface. A main window titled "Campaigns (41) for Ed Corley / Ski Tips" is visible. Overlaid on this is a smaller window titled "Activity - Develop Interest / Campaigns (41) for Ed Corley / Ski Tips". This activity window contains several fields: "Contact Type" (Phone Call), "Status" (Customer Review), "Next Step" (Send Lf Pack), "User" (Marketing Supervisor), and "AWM Activity". It also shows a "Scheduled At" date of 02/17/03 and an "Elapsed Time" of 00:07:20. A "Short Desc" field contains the text "Develop Interest". Below this is a "Notes" section with a "New Notes" entry dated 02/17/03 02:16:20 PM, stating "Ed would like to see more information about the product." At the bottom of the activity window, it shows "Total Duration: 00:00:00" and "Last Edited" with "OK" and "Cancel" buttons.

The screenshot shows a "Set Follow Up Alarm" dialog box. It features three input sections separated by "OR" labels. The first section has "Enter Alarm Date" with a date picker set to 00/00/00. The second section has "Set Alarm Date in" with a dropdown menu and radio buttons for "Day(s)", "Week(s)", and "Month(s)". The third section has "Set Alarm Time at" with a time picker set to 08:00 and radio buttons for "AM" and "PM". There is a "Clear Current Alarm Date" checkbox. At the bottom right, there are "OK" and "Cancel" buttons.

Lead Management con't

Qualified leads are passed onto ESP Sales Management function for further prospect development by the sales staff

The screenshot displays the 'ESP - Sales' application window. The main window title is 'SSO (122) for Ed Conley / Ski Tops'. The interface includes a menu bar (File, Edit, Activities, Resources, Reports, Admin, Window, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Caller Criteria:** Fields for First Name (Ed), Last Name (Conley), Phone ((505) 375-4660), Company (Ski Tops), Address (5678 Paseo Del Norte), City (Albuquerque), State (NM), and Zip (87111).
- SSO Details:** A section with tabs for SSO, Caller/Company, History, Other, and SSO Details. It contains dropdown menus for Position (01 - Employee), Priority (01 - Urgent), Received By (Marketing Supervisor), Funnel Pos. (02 - Above), SSO Status (00 - Qualifying), Sales Rep. (Sales Supervisor), Probability (010 - Interest Confirmed), Escalated To, and Closed By.
- SSO Name:** A text field containing 'Marketing Lead Passed to Sales'.
- Activity/Notes:** A section with a table for 'Start Date', 'Contact Type', and 'Next Step'.
- Metadata:** Fields for Marketing ID (41), Sales Order #, SSO # (122), # of Edits (1), and Last Edited (Sales Supervisor, 2/17/03 14:47:00).

Sales Management



Develop quotes in ESP and print them out using *Crystal Reports*

ESP - Sales

File Edit Activities Resources Reports Admin Window Help

Product Master

Caller: Ed Conley Company: Ski Tops

Sales Order: Quote: Place quoted items here Sales Quote: 90

Manufacturer	Product	Model	Company
IBM	2.4 GHz Desktop	T2400	Compa
Microsoft	Keyboard	Natural 101 web	Compo

Configuration Info Sales Order Info Product Info Available Sales Order(s)/Product(s)

Quantity: 5.00

Discount %: 5

Details:
black color
silver border

CustomerSoft Sales Quote

2 Executive Drive East
Suite 180
Englewood, CO 80112
303-217-9000
Fax: (303) 408-1330

Quote #: 122900
Date Issued: 3/15/2001
Issued By: Ed Conley

Contact Name: Ed Conley
Title: CEO
Address: 1875 Powers Blvd North
Aurora, Colorado
Phone: 303-475-1111
Fax: (303) 475-4658

Quantity	Description of Product or Service	Unit Price	Ext Price
7	IBM T2400 Desktop 31400 Detail: black color silver frame	1571.00	11,000.00
10	Microsoft Keyboard Natural 101 web Detail: black color	28.00	2,800.00
Total Sales Quote:			13,800.00

Sales Management con't

Use *Crystal Reports* to also evaluate sales forecasts, effectiveness of marketing campaigns, and much more ...

Account Manager	Project	Publin	Product	Units	Revenue	%	Adjusted	Forecast	Details on E
SUPER	Justus International	01 - Euphoric	IBM 1.4 GHz Booking T1400	1	\$				
			Microsoft Keyboard Natural 801 w	3	\$				
					\$ 33				
SUPER	Justus International	01 - Euphoric	IBM 1.4 GHz Booking T1400	5	\$1				
			Microsoft Keyboard Natural 801 w	3	\$				
					\$ 12				
BEID	Kokoseli World	02 - Orest	IBM 1.4 GHz Booking T1400	1	\$				
			Microsoft Keyboard Natural 801 w	4	\$				
					\$ 30				
Total for					\$ 18				
February 2003									
BEID	Pharma Inc		IBM 1.4 GHz Booking T1400	1	\$				
			Microsoft Keyboard Natural 801 w	2	\$				
					\$ 27				
Total for February 2003					\$ 27				
TOTAL					\$ 20				

Business Keys: 30% Objective Available
 0% Lost/Closed 40% Budget Available
 30% Interest Unconfirmed

Account Manager	Marketing Div	Project	Line Item	Revenue	%	Adjusted	Forecast	Cost
Marketing								
TOTAL \$ 1000 \$ 000 \$ 000 Profit \$ 45,000								
Total Marketing Cost: \$ 68,200 Total Profit: \$ 45,000								

Order Fulfillment



ESP Sales Management processes help turn prospects into “customers”



ESP can be interfaced/integrated with your manufacturing, distribution, and/or accounting processes/systems to help ensure timely and accurate data transfer

Project Management

As appropriate, use ESP's Project Management capabilities to ...

- Track and bill “time and materials” activity
- Define and monitor project “deliverables”

The screenshot displays the ESP 4.0 Project Management interface. The main window is titled "Services Information" and shows a form for project details. The "Training Information" section lists several training classes: ESP Administrator Training Classes: 1, ESP End User Training Classes: 4, Crystal Training Classes: 1, and ESPortal Training Classes: 1. The "Billing Options" section shows "Days" selected and "Hours" unselected, with a "Proposed" rate of 10 and a "Rate" of 1500. The "Project Start Date" is 01/28 and the "Project End Date" is 02/02. The "Probability %" is 50.

A secondary window shows a table of "Deliverables" with columns for "Deliverables", "Due Date", "Estimated Hours", and "Service Completed" (Date and Hours). The table lists the following deliverables:

Deliverables	Due Date	Estimated Hours	Service Completed - Date	Service Completed - Hours
Initial Onsite Visit	01/29/03	4	01/29/03	4
ESP installation and implementation	01/30/03	8	01/31/03	8
ESP Configuration and customization	01/31/03	8	02/01/03	8
ESPortal Training	02/01/03	8	02/02/03	10
		0		0
		0		0
		0		0

Customer Support

ESP's Customer Support model involves three components ALL supported by the underlying incident *Knowledge Base*....

Incoming customer
support call



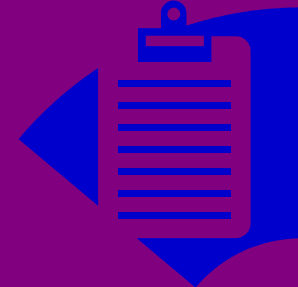
Call Center



Application
Services



Certification



Knowledge Base



A Premier Data Services Company

Customer Support: Call Center

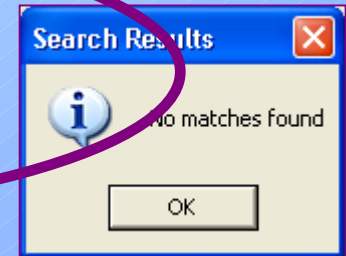
Assume the Call Center takes a customer call regarding an "error 25" incident ... Call Center Representative can immediately determine customer's *service level agreement* status via ESP

The screenshot displays the ESP 4.0 software interface. The main window shows an incident titled "Incident (130) for Justus Husmer / Justus International". The caller criteria include: First Name (Justus), Last Name (Husmer), Phone (303) 234-5570, Company (Justus International), Address (1234 Inverness Drive), City (Denver), State (CO), and Zip (80112). The incident details show Product (ESP), Version (4.0), Type (Error), Priority (High), and Status (Open). The short description is "error 25".

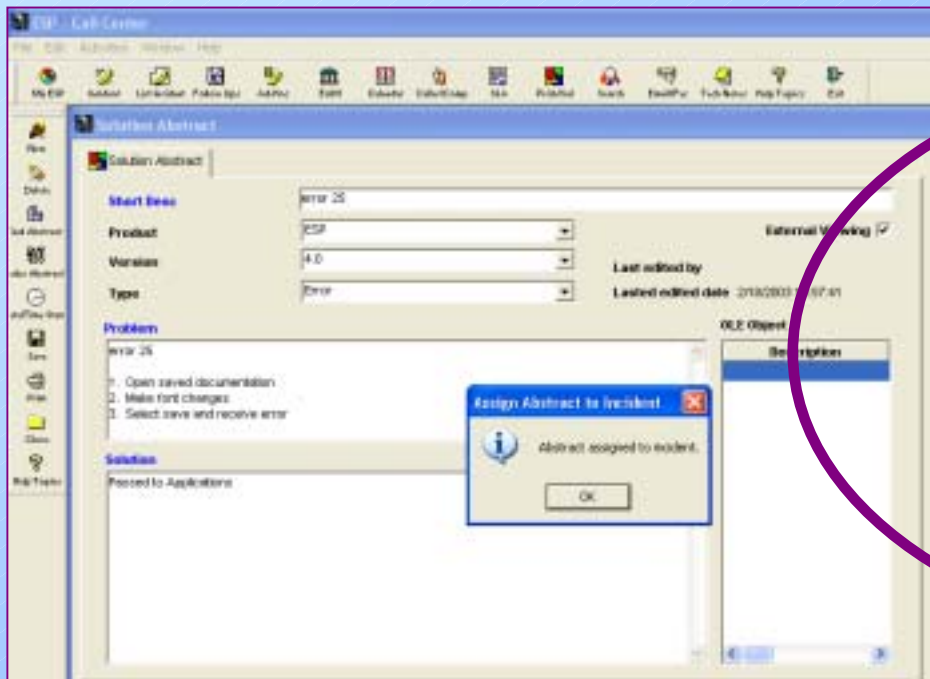
An inset window displays the SLA (Service Level Agreement) information for the incident. The SLA is identified as "SLA 88" with a status of "60 free Minutes remaining - Billing per Time". The start date is 02/17/03 and the end date is 02/17/04. The billing information shows a billing amount of \$25.00 per minute, a tax rate of 0.00, and an amount paid of \$5.00. The method of payment is "Credit". The last edited date is 02/17/03 12:02:00 PM by Reid Husmer.

Customer Support: Call Center con't


Call Center Representative performs an instant search on "error 25" in the ESP solution *knowledge base* ... but no solution is found



Representative recreates problem and determines that a *bug* exists ... ESP incident status changed to "Pass to Applications" and a **Solution Abstract** is defined in *knowledge base* and thus available to ALL Call Center Representatives



Customer Support: Application Services



The Application Services unit takes ownership of the “error 25” incident ...

Confirms if actual *bug* exists ... if NOT, passes ESP solution abstract back to Call Center with solution description (now part of knowledge base)

If *bug* does exist, determines if reasonable “fix” possible and develops fix before passing the ESP defined solution onto the Certification unit as a new *incident* ... otherwise, “enhancement request” is logged via ESP

Customer Support: Certification

The Certification unit tests the developed bug fix and returns “failed” fixes to Application Services unit via ESP ... successfully tested fixes are returned to the Call Center via ESP



Any customer who logged an “error 25” incident with Call Center receives automatic notification of solution

Portfolio/Account Management

Knowing your customers
is critical to maintaining their loyalty and
increasing their sales volume with you ...

ESP provides a variety of information in support of
these objectives, including:

- Product and service sales history
 - Agreement renewal prompts
 - Customer support history
- Product enhancement request history



Product Management

The Research & Development unit can utilize enhancement request information to help define the future direction of products and services

Enhancement Request	
14168	Number of Edits: 5
Description: Shorten the short desc box on activity list so that they don't have to scroll to see type	
Received Date & Time: 8/3/2001 9:16:00AM	
14276	Number of Edits: 4
Description: Increase width of Equipment fields	
Received Date & Time: 8/9/2001 4:08:00PM	
15958	Number of Edits: 3
Description: Can we customize My ESP window	
Received Date & Time: 8/28/2002 2:46:00PM	
15961	Number of Edits: 5
Description: Call Frequency Report is not showing the Y on Wednesday	
Received Date & Time: 8/28/2002 3:24:00PM	
15968	Number of Edits: 2
Description: Better Distinction between New and New Activity	
Received Date & Time: 8/28/2002 4:02:00PM	

Marketing Management

The Marketing unit is again tasked with gaining customers (new and repeat) for your products and services ...

Future marketing campaigns can be defined and developed with assistance from ESP information, including:

- Product enhancement history
 - Prior lead history
- Prior campaign effectiveness history
 - Customer support history



ESP: Your Complete Lead-Prospect-Customer Cycle Management Solution

