flatbridge

Customer and Operations Management with Customer Relationship Management

Increases Enrollments

Streamlines Marketing and Selling Efforts

Enhances Student and Company Relationships

Enables Course Management Activity Effectiveness and Efficiency

Reduces Administrative Costs

Innovative and Affordable

……….Customer and Operations Management with CRM

A Closer Look at the COM CRM Components

flatbridge: 550 Pharr Road, Suite 212; Atlanta, GA 30305; Tel. 1-877-flatbridge; www.flatbridge.com

What Are Our COM CRM Tools

- Our Customer and Operations with CRM (“COM”) CRM Tools are ***designed specifically for organizations providing executive and continuing education and non-credit course offerings***.

- With our COM CRM Tools, organizations ***improve enrollments, streamline marketing activities and enhance student and company relationships***.

- Our COM CRM Tools provide all the functionality required and desired to ***reduce operating costs and improve the efficiency and effectiveness of marketing and sales activities***.

- The flatbridge COM CRM Tools deliver the information required to meet your organization's CRM goals - ***lots of profitable and satisfied students over time***.

What Insight Do Our COM CRM Tools Provide

The flatbridge COM CRM Tools bring to the user's fingertips, with the click of a mouse, the answers to questions such as:

1. How can I grow my program without sacrificing student satisfaction?

2. How can I gain better insight to my students' and my client companies' needs and wants?

3. How can I create and maintain ongoing relationships with my students that are uniquely valued by each of them?

4. How do I improve the effectiveness of my sales calls and reduce the cost of my total sales calls?

5. How do I reduce the cost of my advertising and promotion campaigns, while making each more effective?

6. How can I free up more of my managers' time to spend on out-reach sales calls?

7. How do I get greater penetration into certain geographic-markets with my limited marketing and sales resources?

How The COM CRM Tools Simplify The Process

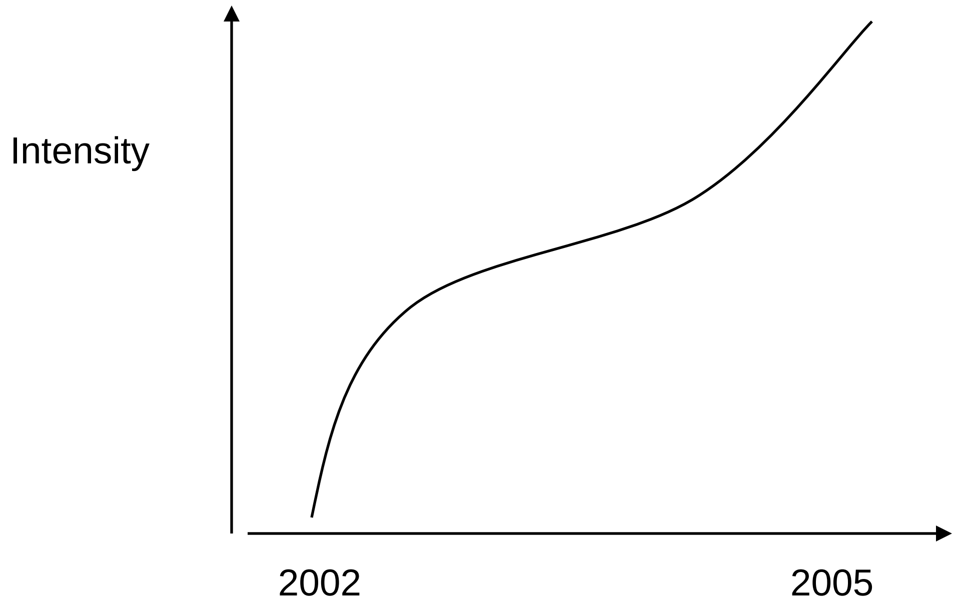
- ***There are no complex or cumbersome queries to write and rewrite in order to gain access to the data you need to respond to key business questions***. The COM CRM Tools provide the information required by marketing and sales managers to identify and create the path on which to migrate prospects to leads, leads to students, students to repeat students, all with a simple point and click.

- The COM CRM Tools are a complete web-based business management application ideally featured to assist you in managing your marketing programs in these changing times. ***These Tools enable you to have a relentless focus on your customer with its full tool set. The customer interaction management, direct email marketing management, and sales coaching and management tools are complimented by its effectiveness reports. The flatbridge COM CRM Tools provide you the labor saving features and information you need to engage your prospects and customers in a personalized and attentive fashion so as to ensure profitable relationships***.

- During the same week you install the COM CRM Tools, you will be empowering associates in all departments with the information and tools to communicate, streamline marketing processes, and manage individual and team efforts. ***You will also be making your students feel important and loyal***, giving you an edge over competitors.

flatbridge

The Evolution Of Our COM CRM Tools



- 2002 Goizueta asks for assistance in obtaining marketing and sales data from their program management software, PowerView CRM was developed as a “bolt-on” operational data store that painted intelligent views from the data tables in the program management software in addition to maintaining resident data; this is our first COM CRM tool set for the Education Industry
- 2003 Smeal asks for an enhanced version of PowerView CRM to include functions and features for all activities associated with managing an Executive Education Program; in November 2003 Customer and Operations Management with CRM (“COM”) was released; our robust CRM Tools are enhanced and are imbedded in COM
- Since then, there have been seven installations of COM: Smeal at Penn State, Goizueta at Emory, School of Management at GA Tech, Internet Security Systems, Graduate Business School at Stanford, Kenan Flagler School at UNC, Richard Ivey School of Business at The University of Western Ontario
- March 2005, the Dean’s Office Studio is released focusing on our CRM Tools for use in the Dean’s office
- June 2005, CRM To Go is released featuring our deep CRM tool set as a bolt-on application to larger legacy systems

How Our CRM Tools Assist You Attain Your Goals

Repeat Business	It is very much cheaper to achieve repeat business compared with achieving new business. By improving your relationship with customers, CRM will help you achieve many more repeat sales.
Targeted Marketing	The scatter-gun marketing approach is costly and inefficient. Targeted marketing is cheaper and can achieve far greater results. CRM helps you gather and interrogate information in a way that has only been available to large organizations until now.
Improved Reputation	By managing your customer relationships and looking after you customers, you will achieve a marked improvement in reputation. This in turn can lead to referrals and new business.
Save Time	CRM will save you time in many ways. Having all required information to hand at any time keeps you informed and organized. Contacting customers either individually or as a group becomes very quick and easy. Retrieve important information when away from the office, even when it is closed. Find out what you want to know quickly and efficiently.

Defining CRM Within COM

- 360˚ Contact Interface Manager provides a 360-degree view of all of the interactions with a contact

- The comprehensive view includes records of correspondence, telephone calls, meetings, direct mail campaign participation, noncredit courses taken, etc.

- The 360˚ Contact Interface Manager allows you to manage your contact To Do's as well was to get a quick review of all of your communications history with the contact

- Because this is a web-based application, all who interact with the contact can see what the interactions of others have been over time. However, access permissions can be set for particular data elements, as desired

- Contacts can register for programs on line, the information is then electronically sent to the program management database

- The user can also assign To Do's to others for the particular contact. The Contact Interaction Coach is immediately available with a click of the mouse

flatbridge

Defining CRM Within COM

Aspects of CRM	How Addressed Within The COM CRM Tools
360-Degree View of Customer Interactions	Contact Management – http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 Contact History - http://reg.flatbridge.com/contactmgmt/contacthistory.aspx?id=67093 with interaction history of conversations, emails, correspondence, direct mail efforts, etc. To Do Management – http://reg.flatbridge.com/admin/todos.aspx and http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 Registration History - http://reg.flatbridge.com/admin/studentregisterinfo.aspx?id=67093 Financial History - http://reg.flatbridge.com/admin/studentfinancials.aspx?id=67093 Materials Archive – http://reg.flatbridge.com/coursematerial/addstudentmat.aspx?id=67093 Participant Accessible Contact Information Update – http://reg.flatbridge.com/studentsite/studenthome.aspx Related Party Visibility – http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 Contact Preference Info - email type, do not mail, preferred contact method, etc. http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 Web-Based Collaboration
Identifying Needs and Wants	Online Survey Tool – http://reg.flatbridge.com/survey/surveys.aspx provides intake and report compilation functions
Reference Sources	Ready Reference - http://reg.flatbridge.com/admin/courseinfo.aspx?id=500
Life-Long Learning Relationship Device	Personalized Individual Websites - http://reg.flatbridge.com/studentsite/studenthome.aspx Professional Development and Career Management Tools – http://reg.flatbridge.com/studentsite/reading.aspx and http://reg.flatbridge.com/studentsite/career.aspx Networking Tools – http://reg.flatbridge.com/studentsite/network.aspx Course Calendars and Course History - http://reg.flatbridge.com/studentsite/scourseinfo.aspx

Defining CRM Within COM

Sales Funnel Supporting Material – extends the depth of knowledge available to personnel responding to contact requests for information. These are pop-up coaching screens with information messages about events, special programs, courses, etc. Using these screens ensures all of the aspects of the particular message get delivered at the time of the interaction with the contact. The scripting tools provide a means to ensure more effective/consistent messaging across associates and affords the ability to leverage tasks to less experienced associates. The same scripting tools are used to create standardized scripts for emails, again ensuring consistency in messaging.

Sales Funnel – enables you to closely monitor anticipated attendance at events throughout the sales process and post-program follow-up. The sales funnel discipline allows the user to focus efficiently on specific contacts with like interests or characteristics to be invited to a program. The funnel works with the direct mail/communications manager providing visibility specifically (via data drill-down) to those contacts being invited to attend and those accepting the invitation. This increases the efficiency and effectiveness of the sales process by organizing the process so as to focus of specific contacts versus handfuls of amorphous contacts.

Direct Mail/Communications Manager – makes direct marketing or other communications easy. No longer do you need to write complex queries to extract a highly discriminated mail list or event participant list from your database. List acquisition is completed with a point and a click of a mouse. This is accomplished through a powerful database search and list making capability. Once a list is acquired it can be used in a broadcast email campaign or sent to the word processor or fulfillment house for a more traditional direct communication effort. Individual prospect and contact records are easily populated noting each participated in the campaign. The management of the outbound communications effort is efficient, but the effectiveness of this approach is increased many fold with the use of the Email Tracker component of application. This feature provides information on email disposition. A series of views/reports provide insight as to which of the emails have been opened and how many times. This feedback is invaluable when doing the follow-up on email campaigns and in gauging the effectiveness of these efforts.

Survey Manager – enables you to create web-based survey forms and to collect the input from your constituents electronically. Survey result summaries are available in PDF and Excel formats. The creation of these unique forms is all done with the point and the click of a mouse. No complex queries are involved. The assistance of a webmaster is not required.

Defining CRM Within COM

Aspects of CRM	How Addressed Within The COM CRM Tools
Sales Funnel	All Program View - http://reg.flatbridge.com/contactmgmt/salesfunnel.aspx Detail Drill-In - http://reg.flatbridge.com/contactmgmt/studentfunneldetail.aspx?id=4144&status=1 Individual Program Comparative Funnel - http://reg.flatbridge.com/admin/coursefunnel.aspx?id=500 Participant Funnel History - http://reg.flatbridge.com/admin/studentsalesfunnel.aspx?id=67093
Direct Mail/Newsletter Communications Manager	List Management - http://reg.flatbridge.com/admin/listinfo.aspx and advanced search http://reg.flatbridge.com/custom_reports/participants.aspx Campaign Management - http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx Contact Interaction Management - http://reg.flatbridge.com/admin/campaignmanagement.aspx Interactions Annotated at Customer Level - http://reg.flatbridge.com/contactmgmt/contacthistory.aspx?id=67093
Marketing Profile Dimensions	Interest Codes, Occupational Codes, Referrals and Referral Codes - http://reg.flatbridge.com/admin/editstudentinfo.aspx?id=67093 Job Title, Management Function, Salary Range, People Supervised, Education, Birth Date - http://reg.flatbridge.com/admin/editstudentinfo.aspx?id=67093
Message Consistency Tools	Funnel Scripts - http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 Emails Scripts - http://reg.flatbridge.com/admin/studentregisterinfo.aspx?id=67093 Sales Funnel Supporting Material - http://reg.flatbridge.com/contactmgmt/salesscript.aspx Admit and Acceptance Letters - http://reg.flatbridge.com/admin/waitlist_approve.aspx?format=1&id=24745
Performance Measurement	Marketing Performance - http://reg.flatbridge.com/admin/quickreports.aspx, i.e. sources of referrals, media effectiveness, campaign effectiveness, brochure effectiveness, time in sales funnel monitor, etc.

Defining CRM Within COM

Several Customer Relationship Management Questions	Function in The COM CRM Tools
1. How can I gain better insight into the needs and wants of my key markets?	1. Web survey tool - http://reg.flatbridge.com/survey/surveys.aspx
2. How can I create on ongoing relationships with my students and client companies?	2. Student and company websites – http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093, then click on Logon participant website and http://reg.flatbridge.com/admin/companyweb.aspx?id=678136, then click on Logon to company website
3. How can I improve the effectiveness of my sales calls and reduce the cost of my total sales calls?	3. Sales funnel discipline and focus – http://reg.flatbridge.com/admin/coursefunnel.aspx?id=500 and http://reg.flatbridge.com/contactmgmt/salesfunnel.aspx and http://reg.flatbridge.com/admin/studentsalesfunnelreferral.aspx?id=67093 and http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 and http://reg.flatbridge.com/custom_reports/participants.aspx
4. How can I measure the effectiveness of my advertising and promotion campaigns?	4. Campaign management - http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx and http://reg.flatbridge.com/custom_reports/participants.aspx
5. Can I get geographic displays of my market data?	5. Yes, with the integration of mapping software, geographic oriented views can be played-up.
6. What can I expect in custom program sales in the next six months?	6. Custom program sales funnel and reports, http://reg.flatbridge.com/custom/customfunnel.aspx and http://reg.flatbridge.com/sales/customgoals.aspx and then click Sales View Account Mgr (Detailed), http://reg.flatbridge.com/sales/customgoals.aspx.
7. When do I need to start the selling process for program X or for program Y, and what marketing approach works best for each program?	7. Sales funnel reports reflecting number of days in each stage of the funnel with information on funnel yield, i.e. if I send 10,000 emails how many enrollments do I receive and how does this vary by program type. The same types of questions can be asked of media ads and brochures. (This information is sourced at the time the person is entered into the sales funnel.)

Defining CRM Within COM

Overview of Business Process Steps Associated with Tracking Target Account Activity

Business Process Steps	Work Steps in COM CRM Tools
1. Chanika Angchaisiksiri is sent an email in a broadcast email campaign	1. Create a complex query to pull a list of names from database, http://reg.flatbridge.com/custom_reports/participants.aspx. Can have the list in web format or Excel format. Can use list for email broadcast from the application or send Excel list to fulfillment house for hard copy mailing. 2. Create a campaign and track the broadcast email results, http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx. 3. Create an email script for the campaign, http://reg.flatbridge.com/admin/campaignmanagement.aspx. 4. Mail the email script to the list of names, http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx. 5. All name records are marked in Contact History that name was included in campaign http://reg.flatbridge.com/contactmgmt/contacthistory.aspx?id=67093 and campaign results are summarized on ongoing basis, http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx.
2. There is a low number of responses to the first wave of the email blast. A second wave of the same email is sent to those who did not view the first wave email.	1. Mail a second wave of the scripted email, http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx. Add to a list the names the first wave of the email was sent to. Exclude from the list those names that have already viewed the email. Email to the modified list the first email. Repeat the process in two weeks using the same process to increase penetration into the names on the list.

Defining CRM Within COM

Overview of Business Process Steps Associated with Tracking Target Account Activity

Business Process Steps	Work Steps in COM CRM Tools
3. Chanika calls or emails responding to the email asking for information. (If Chanika calls in because of a person's referral, we could capture that information, associating Chanika's call with a name in the database. If there was a link in an email to a website, that information could also be captured.)	1. Document Chanika's phone call in Contact Management, http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093 and http://reg.flatbridge.com/contactmgmt/contacthistory.aspx?id=67093. 2. Place Chanika into the Sales Funnel for the particular program, http://reg.flatbridge.com/admin/studentsalesfunnel.aspx?id=67093, then http://reg.flatbridge.com/admin/studentsalesfunnelreferral.aspx?id=67093.
4. Chanika gets additional information from the office on the program.	1. Send a scripted email explaining the benefits of the program, http://reg.flatbridge.com/admin/studentinfo.aspx?id=67093, then click send on Email Management after selecting a script. (Typically there are scripts for each program. Attachments can be added to the email. These emails are tracked in Contact History.) The script will likely have a hot link to a web program registration form.
5. Chanika reads the email and decides to attend the course. She clicks the hot link and is taken to the online registration form. She provides the information requested. Chanika receives an email response acknowledging her registration.	1. The information is automatically transferred into the database and Chanika is applied to the program with all appropriate records being updated. 2. An auto response confirming email is sent to her. 3. A person in the office is alerted to her registration, via a To Do and an email, and takes the next steps in the business process. 4. Chanika is registered in a program. 5. Sales funnel is updated automatically for Chanika's registration in the program.

Other Features

Event Management - http://reg.flatbridge.com/event/eventdetail.aspx?id=96
The effective and efficient delivery of a program or event is not an insignificant task. There are many moving pieces in the puzzle. The Event Management tool allows event work plans to be created which can consist of hundreds of detail tasks. These tasks can be assigned to different team members with the completion of these tasks monitored by the program managers. If a team member is out for a period of time, his or her assigned tasks can be reassigned, without a hiccup in the smooth flow of tasks needed to support the event. The event management component supports rich drillable calendar views which clearly identify current tasks and their state.

Image Galley, Name Tags and Tents - http://reg.flatbridge.com/admin/instructorimagegallery.aspx
The application has the capability to store and manage images to be used in the production of name tags and tents as well as in proposals or other communications. Once again, this functionality is available with the point and click of a mouse.

Reports Manager - http://reg.flatbridge.com/admin/quickreports.aspx
The goal of the Reports Manger is to provide +80% of your teams reporting needs with the point and click of a mouse. The balance of the report generation is accomplished with the Custom Report Generator. The Reports Viewer typically contains between thirty and forty reports. These are the reports used with the greatest frequency. They are in the Report Viewer so that they are readily available with just a point and click of the mouse. The Custom Report Generator is available for more sophisticated reports and for the generation of the most complex lists that are used for mail purposes.

Administrator - http://reg.flatbridge.com/manage/admin.aspx
The Administrator puts the users, not the webmaster, in control of the content on the website portion of the application. Website content for the student sites is managed through text box inputs in the Administrator section of the application. In addition to content management, the section of the application also provides functionality for the management of permission access to various sections of the application, the mail list importer and the Custom Field Configurator. The Configurator tool allows the user to add custom fields to the student, company, staff and course detail information pages. Also available are tools for duplicate record management, sales funnel management, etc.

Defining Rooms Management

- The Rooms Management functions and features are available as an *option* in the CRM Tools Kit. The demo has a shell representing these functions and features. For each installation the shell is customized to “fit” the particular client’s needs
- The shell’s working functionality primarily demonstrates
  - Manage room events: names, status, type, billing reference, coordinator, customer, program, notes and dates
  - Reservations: start and end times including prep and clean-up, description, room, type, repeat capability, within reservations there are
    - ✓ Supplies: types, billing, description, units, standard price with override, items master and on hand units, capability, notes
    - ✓ Multiple checklists: status indicator
  - Calendar: master, by room, color coded by event types
  - Financials: auto invoice in pdf, accounts receivable aging
  - Event search
  - Resource search
  - Reporting: sales
- One major feature not included in the shell is the sales funnel for room sales; the funnel stages and functionality is similar as to that for open enrollment and custom programs. However, it is anticipated that the funnel stages would include the stages: Definite, Tentative, Prospect, Lost Business, Out of Order, Wait Listed, Cancelled or something similar

flatbridge

Defining Rooms Management

Aspects of Room Management	How Addressed Within COM CRM Tools
Start page for RM	http://reg.flatbridge.com/rooms/rooms.aspx provides a room inventory
Calendar	http://reg.flatbridge.com/rooms/event_calendar.aspx One of several views to be created with color coding by event type and drillable into events. Would anticipate additional calendar views i.e. of room capacity, etc., as desired
Event detail	http://reg.flatbridge.com/rooms/entry_detail.aspx?id=9 Gathers all information about a reservation. Assign to a program or not. Assign a room. Assign supply items. Create drillable checklists with complete status indicators
Event search	http://reg.flatbridge.com/rooms/event_search.aspx Search capability based on numerous dimensions
New event	http://reg.flatbridge.com/rooms/new_reservation.aspx Add new events associating sales funnel stage, sales person, billing reference, company name, program, etc.
Resource search	http://reg.flatbridge.com/rooms/resource_search.aspx
Reports	http://reg.flatbridge.com/rooms/reports.aspx Anticipate numerous reports to be defined with inputs from the client. Drill all the way through the sample Revenue report to get a sense of how the structure will work
Invoicing	http://reg.flatbridge.com/financials/invoicedetail.aspx?id=283&course_id=472 Invoices are compiled automatically and available in pdf to email to customer. Invoices can be emailed from the application

Performance Reporting

- Performance reporting is designed on a custom basis for each client based on our common understanding of the business needs of the client
- The goal of performance reporting is to capture the critical business metrics of the client in intelligent views that have date range options and Excel presentation capabilities; these reports are typically selected from drop-down lists
- Performance reporting needs are defined at installation and views are quickly developed via an iterative process with the client (The next several slides illustrate this point with three examples.)
- Subsequent reports/views can be compiled by the University's IT group using their MS SQL tools; an integration tool exists for developers to effortlessly integrate new reports into the existing drop-down lists
- Our approach to performance reporting ensures that the "right" reports, with the "right" set of data are available, any time, any place with a point and click of the mouse, without the creation of a "query"

flatbridge: 550 Pharr Road, Suite 212; Atlanta, GA 30305; Tel. 1-877-flatbridge; www.flatbridge.com

flatbridge

Performance Reporting

First Draft Revenue Report

Drill into Room A View

Revenues (Jan 05 to Mar 05) (Room A)	Date	Event Type	Renter	Salesperson	Total Spaces	Attend	Total	Room Rental	Meals	Sup	Equip	Other
Event 1					25	15	$5,500					
Event 2												
Event 3												
Total												

- Underlined items are drillable: Event to event detail i.e. set-up and related details, Attended to participant names with links to individual records, Total to invoice detail
- Columns sort in either alpha or numerical order, low to high or vice versa

First Draft Room Prospect To Definite Effectiveness Report

Selection Criteria: Date Range, Presentation Format (Excel or Drillable), Dimension (Room #, Company, Sales Person, Type of Event, etc.)

Possible Report/View Format: Dimension = Room; Date Range = Jan 05 to March 05; Presentation Format = Drillable

Room Funnel Stage (Room A) (Jan 05 to Mar 05)	Event 1	Event 2	Event 3	Event N	Average or Total
Definite	(1)				
Tentative	(2)				
Prospect	(2)				
Lost Business	(3)				
Out of Order	(3)				
Wait Listed	(3)				
Cancelled	(3)				

Notes:

(1) Days before event date

(2) Days the event was in this funnel stage

(3) Number of occurrences

Underlined items are drillable: Event to event detail i.e. set-up and related details

First Draft Participant Prospect To Paid Effectiveness Report

Selection Criteria: Date Range, Presentation Format (Excel or Drillable)

Possible Report/View Format: Date Range = Jan 05 to March 05; Presentation Format = Drillable

Sales Funnel Stage (Jan 05 to Mar 05)	Event 1	Event 2	Event 3	Event N	Average or Total
Capacity	75				
Completed	50				
Paid	(1)				
Lead	(2)				
Inquiry	(2)				
Lost Business	(3)				
Wait Listed	10				
No Show	5				
Cancelled	2				
Direct Mail Campaigns	4				
# of Direct Mails	5,000				

Notes:

(1) Avg. days before event date

(2) Avg. days the event was in this funnel stage

(3) Number of names left in funnel at event date

Underlined items are drillable: Event to event detail i.e. set-up and related details, Numbers to detail lists of names which in turn are drillable to individual records

Questions You Might Have

Questions	Flatbridge Responses
Can I create and manage marketing campaigns?	Yes. You can create, launch and manage broadcast email campaigns and can obtain discriminated mail lists for use in Word or submission to a fulfillment house for a traditional direct mail effort. http://reg.flatbridge.com/campaignmgmt/viewcampaign.aspx
Can I track a customer's response from receipt of marketing material to course completion?	Yes. A sophisticated Sale Funnel is available that provides the ability to monitor a target's progress through the various stages of the selling cycle from identification as an inquiry to course completion. Easy to use supporting marketing and selling scripts are available to assist in "moving" the customer through the selling process. Email and campaign contact interactions are tracked http://reg.flatbridge.com/contactmgmt/salesfunnel.aspx. *See the Performance Reporting slides for examples of reports that could be generated.*
Can I import purchased lists of names into the application?	Yes. Data import is quick and efficient with the use of the data import tool. http://reg.flatbridge.com/manage/import.aspx . Duplicate record checking tools are also available to "clean" imported records. Can apply a "do not mail" tag to prevent mails to those who request not to be solicited by direct mail.
Can I track a course's activity from inception to close?	Yes. Complete course life-cycle visibility is available from "cradle to grave". Each course has its own unique sales funnel and a means for tracking the source of the participants from a marketing perspective. This is very helpful when evaluating the effectiveness of marketing and media selections.

flatbridge

Questions You Might Have

Questions	Flatbridge Responses
Do I have the ability to do detail analysis in the data?	Yes. There are a number of pre-defined intelligent views or reports within the application, http://reg.flatbridge.com/admin/quickreports.aspx. There is also a powerful custom report writer query tool, that is all point and click based, http://reg.flatbridge.com/custom_reports/participants.aspx. These reports can be saved and run again with different date ranges, etc. *See Performance Reporting slides for examples of reports.*
Are facilities (room rental) marketing and sales tools available?	*Yes*. The application has an *option* with the capability to manage rooms assigned to courses. There is a shell set of tools in the online demo. This functionality is built-out depending on the specific needs of each client.
Is there a proactive alert management mechanism to warn that course enrollments are dangerously slow?	Yes. The Sales Funnel for a program provides an instant snapshot as to where the sales activity is for each course. The number of people engaged in the selling process and the identification of each person in a particular sales funnel stage, provides the information required for focused sales and marketing efforts to fill a course as its performance date approaches. http://reg.flatbridge.com/admin/coursefunnel.aspx?id=500 The Sales Funnel for a course can be compared to historic sales funnels for the same course or for other courses so as to gain a relative perspective as to the progress toward filling the seats.
Is there the ability for customers to "opt out"/list management?	Yes. The opt-out feature which can be presented at the bottom of each email, transfers the recipient to a web page where a reason for the opt-out decision can be gathered. This information can be beneficial in subsequent marketing analysis. The application supports opt-out for e-mail and traditional direct mail. http://reg.flatbridge.com/admin/editstudentinfo.aspx?id=67093

Questions You Might Have

Questions	Flatbridge Responses
Is there the ability to purge (i.e. reduce duplication, non-converts) one-time use lists?	Yes. Very highly discriminated lists can be generated for use in marking and sales. These lists can be analyzed one name at a time and action taken to delete a particular name from the list if desired. Names on any list can also be maintained using the duplicate record check function previously described. E-mail is de-duped on send so that anyone appearing more than once on a list is only sent one email.
Can I create and conduct online surveys?	Yes. A powerful *optional* survey tool is available. The tool presents survey information requests on a webpage and collects responses in the database for presentation in automated pre-scripted reports. A wide range of question types can be created and utilized. Individual results and summarized results are automatically generated and can be viewed in Excel. The survey tool is similar to our online evaluation feature, http://reg.flatbridge.com/admin/eval_createnewformat.aspx.
Are there event calendars?	Yes. Event and program calendars exist and are accessible throughout the site. http://reg.flatbridge.com/admin/coursecalendar.aspx . Calendars can present total views or individual views depending on the context.

Interface With Outlook

- Existing Functionality
  - http://reg.flatbridge.com/admin/courseinfo.aspx?id=503
  - "Add to Calendar" feature adds program information to Outlook Calendar

- Custom Modifications To Interface – Similar Links to
  - Provide an import capability to load all programs to the Outlook Calendar (http://reg.flatbridge.com/admin/courses.aspx)
  - Provide an import capability to load all To Do's to the Outlook Calendar
  - Provide an import capability for all Events to the Outlook Calendar
  - If Exchange Server is used, provide real-time synchronization of a global calendar to list program and events

An Integrated Online Admissions And CRM Process

- Existing Functionality
  - Registrations are already fully integrated with the CRM system.
  - Live Example (http://execdev.ivey.ca/online/newreg.aspx) – see the “Register Online” section on the right hand of the screen. This application is fully linked into the application with database import
  - If users already exist in the database, an abbreviated form presents which allows email address and password to entered so the longer form need not be filled out again.
  - Example
    - Short Form - http://reg.flatbridge.com/online/reg.aspx
    - Long Form - http://reg.flatbridge.com/online/newreg.aspx
  - Supports different look and feel depending on University requirements. For instance, Ivey Business School has deployed a multiple program registration interface which allows participants to register for multiple programs and sub-offerings simultaneously. Stanford Business School has integrated a sophisticated multi-form admissions process which is fully integrated into the application and is used on their site to support multiple programs with multiple forms.

The Online Demo Application

url = http://reg.flatbridge.com/

User Id. = Please call for access

Password =

- The online demo is an open demo available to parties interested in our COM CRM Tools
- The demo is available 24/7
- We monitor content on a periodic basis, therefore data in the demo represents that from the initial data load and that information entered by those reviewing the various functions and features as to fitness for their use

System Requirements

- Software
  - Microsoft dotNet Framework 1.1 (free download from Microsoft.com)
  - Client Scripting JavaScript (client cookies must be enabled)
  - Browser Support Internet Explorer 6.0+
  - Web Server Internet Information Server 5.0 or above
  - Operating System Windows 2000 Server (SP3) or Windows 2003
  - Database MS SQL Server 2000 (SP3)
  - Remote Administration via Internet

- Hardware
  - Processor Intel Pentium III or higher
  - 512MB-1 GB RAM recommended
  - Drive Space 20GB+ recommended
  - RAID 5 to allow redundancy and increase uptime

Contact Information

flatbridge

550 Pharr Road

Suite 212

Atlanta, GA 30305

http://www.flatbridge.com

Tel. 770.226.6009

Rob Berling

Direct Tel. 404.316.0485

Rberling@flatbridge.com

Slides About The Company, Its Projects and Its Founders

Information beyond that in this appendix is available at

http://www.flatbridge.com/ and http://www.apower.com/

About The Developers

- ***APower Solutions, Inc. - provides consulting and software solution development services to organizations in the areas of***
  - Business solution development focusing on solutions that present “intelligent views” of data, typically residing in larger complex enterprise systems, designed to enable organization personnel to do more with less and to make better decisions via better more relevant and targeted information
  - Database development, custom algorithms and influence analysis, and data mining in large complex data environments
  - Clients include: Time Warner, Victoria Secrets, BellSouth, Bank of America, Cingular
- ***flatbridge – a division of APower Solutions, Inc. which markets and sells software solutions developed by APower typically for niche markets via data mining projects for organizations***
  - Family of six software applications targeted into three niches of current focus: customer and operations management, knowledge management and supply chain effectiveness
  - Clients include: Stanford University, Penn State University, Emory University, The Georgia Institute of Technology, The University of North Carolina at Chapel Hill, The Richard Ivey School at the University of Western Ontario, Internet Security Systems, Inc., Mizuno, SED International

About The Developers – Historical Perspective

- ***APower Solutions, Inc. organized in 1997, after principals accumulated years of experience in education, data and business consulting, and technology***
  - Alan Parker, Ph.D.
    - ✓ Extensive experience working with FORTUNE 1000 companies in implementation of web, data mining and knowledge solutions
    - ✓ Industry experience at I.B.M. Advanced Systems Architecture Division
    - ✓ Professor in Electrical and Computer Engineering at Georgia Institute of Technology
    - ✓ Ph.D. in Electrical Engineering from North Carolina State University in Jan. 1984; BS in Applied Mathematics from Georgia Institute of Technology in December 1980
  - Rob Berling
    - ✓ Extensive experience working with FORTUNE 1000 and mid-market companies in marketing, sales and business operations
    - ✓ Sixteen years at Arthur Andersen, six as an equity partner, in business consulting practice
    - ✓ MBA from Goizueta School at Emory University and BS in Business Administration from Miami University
  - Private company which has funded all growth internally
  - Five “core” employees and a resource pool of 20 seasoned contract consultants/developers
  - Committed to providing both consulting services and software solutions so as to maintain a business model that can dampen the impact of the cyclical nature of the consulting business and the demand for a continuing stream of new software products
- ***Additional information - www.apower.com and www.flatbridge.com***

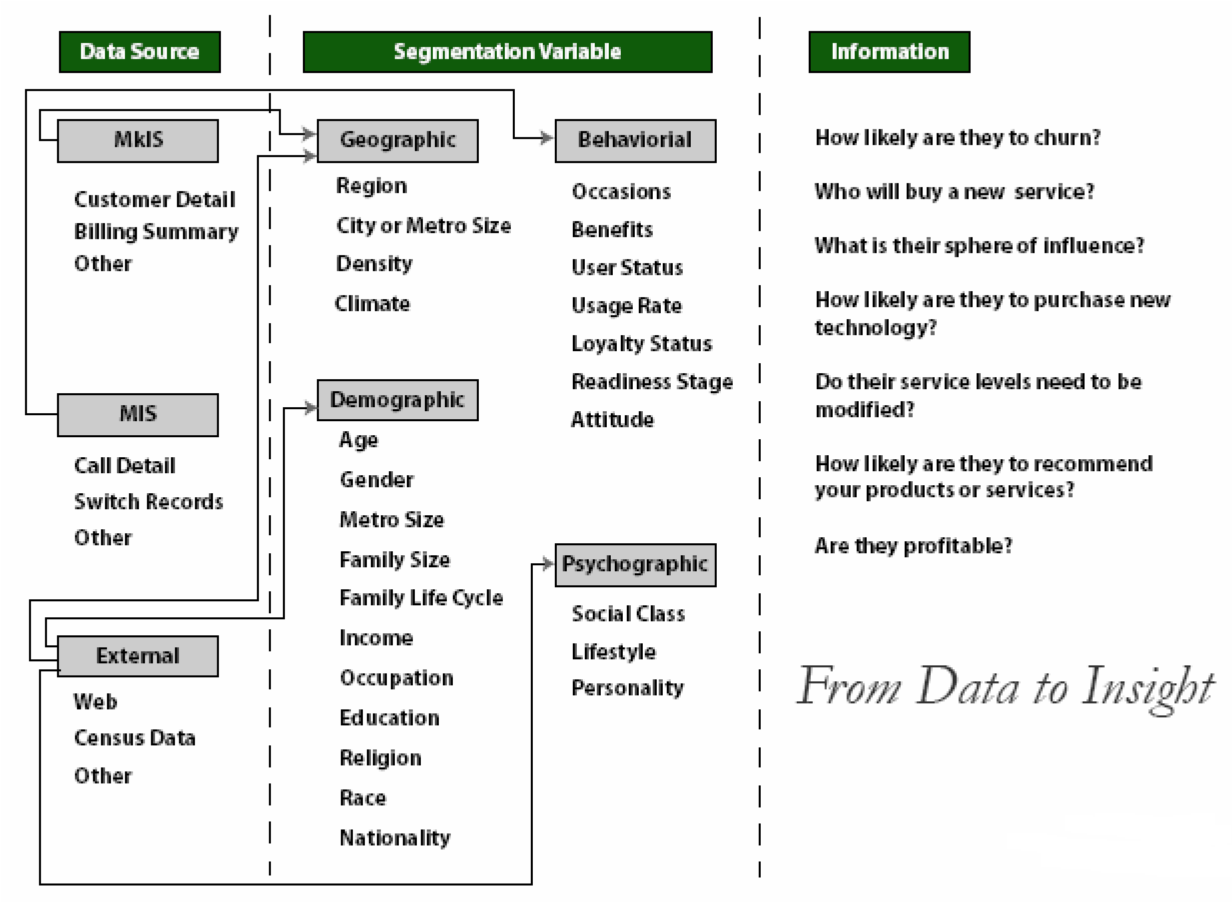
Our Depth In Analysis, Modeling And Data Integration

- APower Solutions has deep experience in providing not only the analytical components of a data mining project, but also the applications/toolsets required for implementation:

  - We have been performing Data Mining engagements since 1997, and our capabilities are described in: Data Mining Techniques For Marketing Sales and Customer Support and Mastering Data Mining: The Art and Science of Customer Relationship Management
  - We have experience working with Oracle data bases in sophisticated environments
  - We have significant expertise with new and incremental enterprise web applications across multiple technologies. Selective experience includes the complete software development for:
    - Customer and Operations Management with CRM, an enterprise application developed for flatbridge running the Executive Education Programs for the Goizueta Business School at Emory University, the College of Management at Georgia Tech, as well as the Smeal College of Business at Penn State, and recently purchased by the Graduate School of Business at Stanford University and the Kenan Flagler School at UNC. The application enables each of the programs to have a relentless focus on their customers with a full CRM (Customer Relationship Management) tool set for customer interaction management, direct email marketing management, sales coaching and management, complemented by a comprehensive reporting structure
    - Travelagencies.com, an enterprise B2B/B2C of agents, travelers and suppliers. The site includes e-commerce, full reporting, lead management, scalable destination portals and LiveAgent CRM communication technology
    - CentralPoint Systems, an enterprise solution delivering electronic sales and marketing systems to underserved markets primarily in the small business, educational, and not-for-profit sectors

An Example Of Our Depth In Market Analysis

An RBOC wanted to increase its cell telephone revenues in a major geographic-market area. At the same time it wanted to reduce its marketing expenditures during the current fiscal year. The RBOC had approximately 85,000 cell phone users. It was decided to attempt to increase phone usage within its current base versus attempting to sign up new users, believing this tact would be more efficient. The company decided to run a promotion consisting of giving a telephone battery to users so as to increase usage. The question that was not readily apparent was which of the cell phone user segments presented the best financial return for the promotion's cost.



An Example Of Our Depth In Market Analysis

A sophisticated data mining process defined the segment with the greatest potential return. Directing the promotion campaign to a specifically targeted segment of users resulted in a 15% penetration at less than one-third of the cost of a traditional effort. Here is how this was accomplished.

Three in-house databases (operational, marketing and credit) were analyzed. The operational data files analysis discovered usage times and patterns of those who might be most likely to increase phone usage. Marketing data files analysis defined those users who had responded to other promotion programs for other RBOC services in the past. Credit files analysis discovered those users who had the ability to easily pay for additional phone usage. These three data files were merged to develop the target market.

External census data was acquired and was used to discover commuting habits and locations of the target market. Database information was purchased to discover purchase behavior and demographics for the target group identified. A number of critical dimensions were defined, such as: occupation, position in career path, time spent in car, wealth.

One of the behavior dimensions investigated in this analysis was the person's comfort referring a product or service to another person. Database information was also purchased to provide credit information on the targets identified. This information was used to cull the list of targets created from the internal information. The target group defined at this point consisted of those who likely needed the extra minutes, could pay for them, and would likely give a referral to another for the service.

Through the use of the data mining techniques, a list of 15,000 targets was identified. The direct marketing campaign was conducted and the result was a participation rate of 15% of the number of targets identified. This result is dramatically higher than the .5% participation rate typically experienced. Because the target group was smaller than the traditional direct marketing target group, the cost of the promotion campaign was significantly less.

An Example Of Our Depth In Data Analysis

A large retail store and catalog house sent out well over 150 million catalogs each year. In one year the company set out to reduce the cost it expended in its catalog business, while it increased the gross margin dollars generated from its catalog sales. To determine how to achieve this seemingly contradictory goal the personnel in the Marketing Department summoned the advertising agency account executive, the catalog distribution company account representative and the strategy consulting firm's representative. After receiving all the learned inputs the Marketing Department personnel decided that collectively they did not know enough about their customers purchase behavior to develop a solution. It was decided to undertake a data mining exercise to determine if the company could garner the "right" insights to their customers so as to meet its dual goal.

The data mining effort revealed two important observations, 1) looking at store sales data it was found that certain stock items were typically purchased together, resulting in a higher revenue/margin ticket; 2) stock items purchased from catalogs varied regionally; and 3) there was a cluster of people that received the catalog, but never purchased from it. Armed with this information the catalog planners reformatted the catalog in two ways. First, the catalog contents were varied by a number of defined regions with the United States with the net result being eight different (70% of the stock was the same) catalogs with fewer pages in each. Second, page layouts were changed to position stock items, which were typically purchased in the store at the same time, within close proximity on the catalog pages. Additionally, the mailing list was culled for a number of no purchase names. Here is how this was accomplished.

1. Sales tickets from the catalog sales for the last three years were analyzed. This analysis looked at individual customer purchases individually and over time. This purchase behavior was contrasted with purchase behavior revealed in an analysis of store tickets from the retail operations. The same purchase linkage between stock items was not seen in the catalog sales data. (Purchase linked stock items are placed next to each other in the retail stores.)
2. The analysis of the sales tickets was also completed on a geographic basis using mapping technology. Once the analysis was complete it was clear that certain stock items were moving in different parts of the country. But the most interesting aspect of the findings was that this was not solely due to expected regional preferences, i.e. shorts in the South and mittens in the North. It seems the customer demographics were different. This characteristic was identified by applying socio-economic factors to the customer data. This discovery provided useful input for the advertising agency so as to adjust the messaging in different sectors of the country.
3. The most difficult decision to make was that of deleting names from the catalog mailing list. Again, the mailing lists were analyzed against the socio-economic data collected and the purchase mapping data. The mailing list was culled of approximately 10% of the names.

The net result of these efforts was that the company was able to achieve its seemingly contradictory goal. Catalog costs were decreased and gross margin dollars generated were increased.