

Executive Interaction Operations Center

Dean's Office Studio

from flatbridge

An Introduction

Presented by Rob Berling and Alan Parker

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- The current situation is described as - - certain “pieces” of information describing constituents’ interactions with the School are available from a number of different sources, but these pieces of information are not consolidated into one logical constituent relationship view; additionally the different applications within which these pieces of information reside are not user friendly or readily accessible anytime, anyplace, anywhere
- We assume the same situation exists for the operational information systems and databases serving the Dean. We assume that many current reports are created by using multiple spreadsheets connected by macros. In many cases these spreadsheets are so complex that even the developer finds them difficult to maintain
- To knit together all the required information necessary to efficiently and effectively manage the operations of the Dean’s office, an Executive Interaction Operations Center could be deployed. In our view, this center would be the Dean’s Office Studio, described herein

What Is The Dean's Office Studio

- In short – the Dean's Office Studio is an interactive executive dashboard with CRM functionality

- The application has two primary capability centers
 - Customer Relationship Management (CRM) functions and features and information that reside in and are maintained in the “operational data store”; this information is supplemented by data from other databases which is presented in the CRM context
 - Intelligent views of information on many aspects of the business of the college. This information is extracted, transformed and loaded into the Dean's Office Studio via automated periodic routines, utilizing flatbridge's sophisticated customer data integration and utility middleware application

- Since each Dean typically views his or her responsibilities uniquely, the information that is extracted, transformed and loaded into the Studio is defined for each installation. The same is true for the design of the intelligent views. These views are defined and developed for each installation

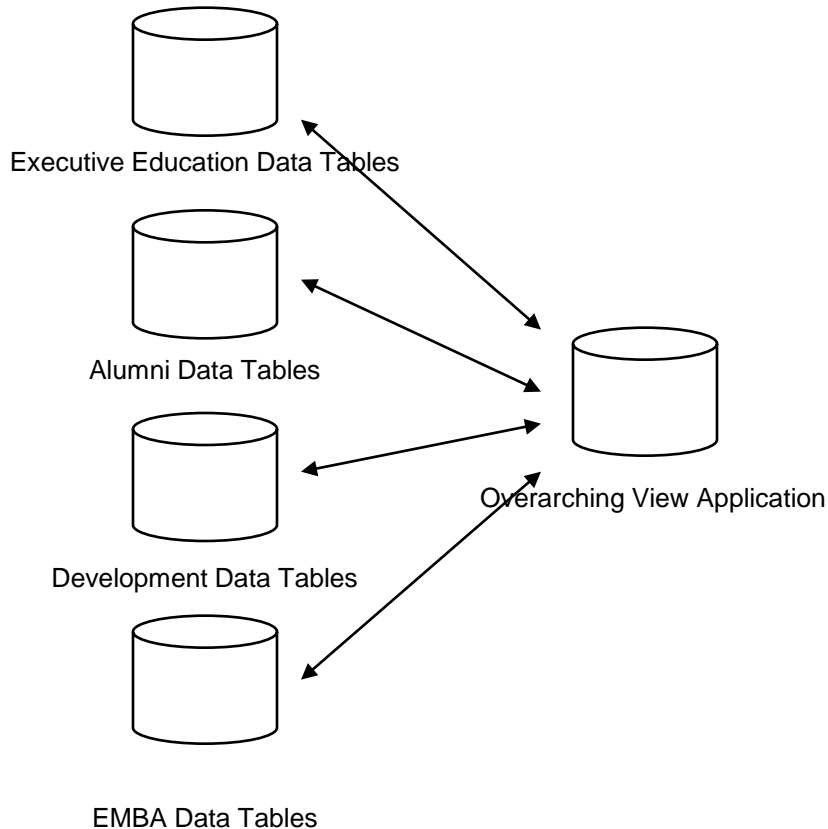
- The primary benefit of the Studio is that it consolidates most all the information the Dean needs to run the business and provides his or her office with a set of CRM tools to be used in the development and assimilation of resources, i.e. human, financial, corporate, etc.

What Insight The Studio Provides

The Dean's Office Studio brings to the user's fingertips, with the click of a mouse, the answers to questions such as:

1. What is the interaction history with each of the members of the group I am meeting with at lunch, i.e. donation history, degree and non-degree program participation, executive outreach session participation, volunteer activities, company affiliations, etc.?
2. How can I gain better insight to my constituencies' needs and wants?
3. How can I create and maintain ongoing relationships with my corporate, community and alumni contacts that are uniquely valued by each of them?
4. How do I improve the effectiveness of my development calls and reduce the total time devoted to my development calls?
5. How do I keep "plugged-in" when I am on the road? How do I make that first day back in the office less painful when going through my inbox?
6. How can I free up more of my staffs' time to spend on out-reach and constituency-building communications?
7. How can I warm-up the "touch" my office has with its constituencies?

Overview And Driving Logic



As Is

- Each group maintains its own data tables and application for performing its operations and data related activities
- The Dean's Office could benefit from a sharing of certain "knowledge" about the School's interactions with its constituents
- There is significant effort involved in compiling information from the various databases into integrated reports

Could Be

- Each group maintains its own data tables and operations application for performing its major data-related activities
- Certain information is pooled in an operational data store and compiled in intelligent views which are accessible by the Dean's Office
- The application maintains certain functionality; the core components are CRM, Communications and Event Management and the custom components are operations based with a focus on the development of constituencies
- The purpose of the Studio is to present a 360-degree view of the interactions between the college and the constituents, in addition to other information important to the Dean

How The Studio Simplifies The Process

- There are not multiple systems to access or reports to request from various departments. There are no complex or cumbersome queries to write and rewrite in order to gain access to the data needed to respond to key business questions. The Studio provides the information required with a simple point and click.
- The Studio is a web-based business management application ideally featured to assist the Dean's Office in managing its communications programs in these changing times. The Studio provides a relentless focus on the customer with its full CRM (Customer Relationship Management) tool set. The Studio's customer interaction management, direct email communications management, and other tools are complimented by its effectiveness reports. The Studio provides the labor saving features and information needed to engage your constituents in a personalized and attentive fashion so as to ensure enduring profitable relationships.
- Shortly after you install the Dean's Office Studio, you will be empowering associates within your office and potentially in other departments with the information and tools necessary to more efficiently communicate with constituents, to streamline event management and communications processes, and to manage individual and team efforts.

What Is The Dean's Office Studio

- There are two primary capabilities centers within the application
 - One center consists of functions and features supporting Customer Relationship Management (CRM), Communications and Event Management operations. Data for Communications and Event Management is maintained within the application and does not require “refreshing” from external databases. Data for CRM is a mix of data originating within the application and data automatically imported periodically from other data sources in the college
 - The other capabilities center consists of intelligent views of information deemed relevant to the management of the operations of the college by the Dean. These are all custom views and are designed and developed depending on the needs and interests of the Dean in each particular situation
- In its use, data is loaded into the application primarily in two ways
 - From the Dean's Office Studio's user interaction as communications with constituents are conducted and recorded and as events are marketed and managed
 - From automated data extracts from various databases and applications within the college, utilizing flatbridge's sophisticated customer data integration and utility middleware application, that contain information of interest to the Dean in performing his or her duties

- 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, donations by campaign, noncredit courses taken, degrees earned, etc.
- In this section you will also be able to register contacts for events, then electronically send program information to them
- The 360° Contact Interface Manager allows you to manage your contact To Do's as well as 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
- 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

Aspects of CRM	How Addressed Within Dean's Office Studio
360-Degree View of Customer Interactions (<i>Standard</i>)	<p>Contact Management – http://dean.flatbridge.com/admin/studentinfo.aspx?id=67197</p> <p>Contact History - http://dean.flatbridge.com/contactmgmt/contacthistory.aspx?id=67197 with interaction history of conversations, emails, correspondence, direct mail efforts, etc.</p> <p>To Do Management – http://dean.flatbridge.com/admin/todos.aspx and http://dean.flatbridge.com/admin/studentinfo.aspx?id=67197</p> <p>Event Registration - http://dean.flatbridge.com/admin/studentregisterinfo.aspx?id=67197</p> <p>Materials Archive – http://dean.flatbridge.com/coursematerial/addstudentmat.aspx?id=67197</p> <p>Related Party Visibility – http://dean.flatbridge.com/admin/editstudentinfo.aspx?id=67197</p> <p>Contact Preference Info - email type, do not mail, preferred contact method, etc. http://dean.flatbridge.com/admin/editstudentinfo.aspx?id=67197</p> <p>Picture ID - http://dean.flatbridge.com/admin/studentinfo.aspx?id=67197</p> <p>Web-Based Collaboration</p>
Illustrative 360-Degree View of Customer Interactions (<i>Custom</i>)	<p>Donations - History and Future Commitments - http://dean.flatbridge.com/dean/renderstudentpage.aspx?mid=8&id=67197</p> <p>Grad Info – Degrees Earned and Non-Credit Programs Taken - http://dean.flatbridge.com/dean/renderstudentpage.aspx?mid=9&id=67197</p> <p>Memberships - http://dean.flatbridge.com/dean/renderstudentpage.aspx?mid=10&id=67197</p> <p>Alumni Events - http://dean.flatbridge.com/dean/renderstudentpage.aspx?mid=11&id=67197</p>
Performance Measurement	<p>Communications Performance - http://dean.flatbridge.com/admin/quickreports.aspx , i.e. sources of referrals, communications effectiveness, campaign effectiveness, brochure effectiveness, time in sales funnel monitor, etc.</p>

Defining Communications Within Studio

Contact Interaction Coach – 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, 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 Contact Interaction Coach 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.

Invitation Funnel – enables the Dean to closely monitor anticipated attendance at events throughout the invitation process and post-event follow-up. The invitation funnel discipline allows the user to focus efficiently on specific contacts with like interests or characteristics to be invited to an event. 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 invitation process by organizing the process so as to focus on 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 Communications Within Studio

Aspects of CRM	How Addressed Within Dean's Office Studio
Message Consistency and Efficiency Tools	Funnel Scripts - http://dean.flatbridge.com/contactmgmt/salesscript.aspx Emails Scripts - http://dean.flatbridge.com/admin/campaignmanagement.aspx Sales Funnel Supporting Material - http://dean.flatbridge.com/contactmgmt/salesfunnel.aspx ; this has been called by some the contact interaction coach because of its usefulness Event Invitation Letters - http://dean.flatbridge.com/admin/studentregisterinfo.aspx?id=67197
Invitation Funnel	All Event View - http://dean.flatbridge.com/contactmgmt/salesfunnel.aspx Detail Drill-In - http://dean.flatbridge.com/contactmgmt/studentfunneldetail.aspx?id=4151&status=1 Participant Funnel History - http://dean.flatbridge.com/admin/studentsalesfunnel.aspx?id=67197
Direct Mail/Newsletter Communications Manager	List Management - http://dean.flatbridge.com/admin/listinfo.aspx and advanced search http://dean.flatbridge.com/custom_reports/participants.aspx Campaign Management - http://dean.flatbridge.com/campaignmgmt/viewcampaign.aspx Contact Interaction Management - http://dean.flatbridge.com/admin/campaignmanagement.aspx Interactions Annotated at Customer Level - http://dean.flatbridge.com/contactmgmt/contacthistory.aspx?id=67197
Communications Profile Dimensions	Interest Codes, Occupational Codes, Referrals and Referral Codes - http://dean.flatbridge.com/admin/editstudentinfo.aspx?id=67197 Job Title, Management Function, Salary Range, People Supervised, Education, Birth Date - http://dean.flatbridge.com/admin/editstudentinfo.aspx?id=67197
Identifying Needs and Wants	Online Survey Tool - http://dean.flatbridge.com/survey/surveys.aspx

Other Dean's Office Studio Features

Event Management - <http://dean.flatbridge.com/event/eventview.aspx>

The effective and efficient delivery of an 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://dean.flatbridge.com/admin/imagegallery.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://dean.flatbridge.com/admin/quickreports.aspx>

The goal of the Reports Manager is to provide +90% 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 ten and fifteen 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.

Geographic Information Display (custom feature)

It has been said that a picture is worth a thousand words. Now, you can present your communications information in a geographical display. You can see on maps the source of your registrations, the pull of your communications efforts, preferences within different parts of the country, etc. The information on the maps is drillable just as the information in the standard application.

Administrator - <http://dean.flatbridge.com/manage/admin.aspx>

This 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 participant, speaker, company, staff and event detail information pages. Also available are tools for duplicate record management, invitation funnel management, etc.

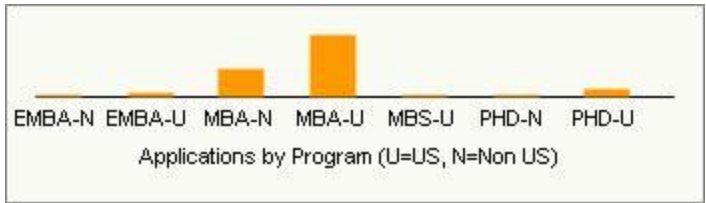
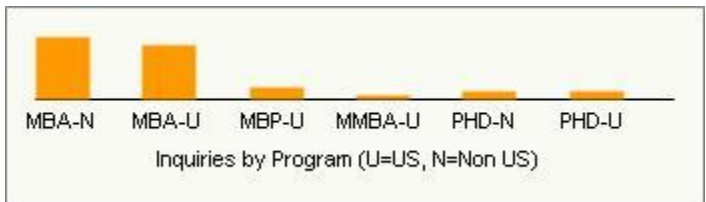
Dean's Office Studio View Of Operations

- The Dean's Office Studio enhances the ability of the Dean to establish a "single version of the truth"
- It also enables the Dean's Office to gather, analyze and integrate internal and external data into dynamic profiles of key performance indicators
- The intelligent views within the Operations View are tailored to each Dean's particular needs and preferences
- The Dean' Office Studio creates a customized portal that extracts information from disparate sources and summarizes it into meaningful indicators. This eliminates the complex multiple spreadsheets now being used to maintain data and to compile reports
- This single information gateway will allow the creation of dashboards and scorecards that summarize transactional and other data on a real-time basis. These views come with data visualization tools with full visual drill-down capability

Dean's Office Studio View Of Operations

Illustrative Custom Integration and Views

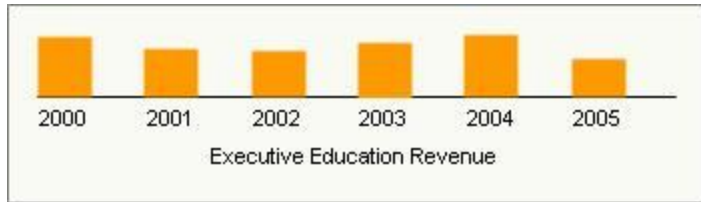
Information from Admissions Application



Information from Career Management Application



Information from Executive Education Application



- Any information important to the Dean can be painted into a dashboard view
- The information can consist current data or comparative data across years
- The dashboard charts can be made drillable into the underlying data elements for more detailed analysis

Dean's Office Studio View Of Operations

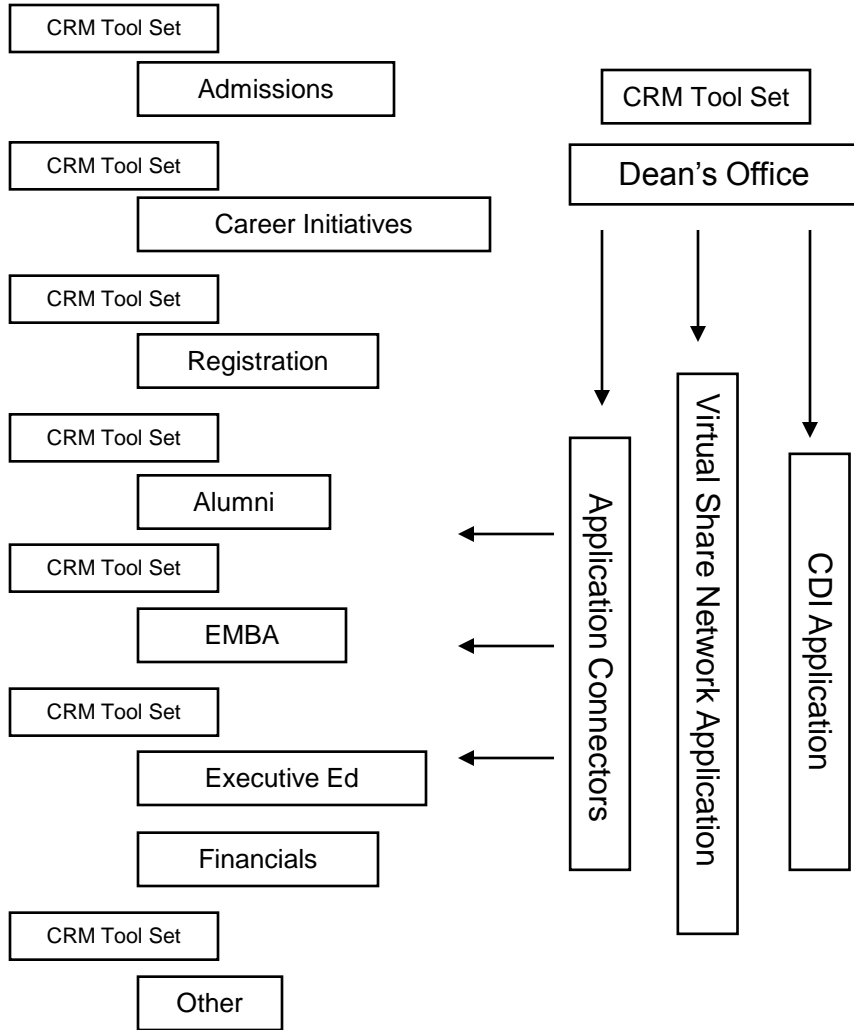
Illustrative Custom Integration and Views

Dashboard Operations Events Speakers Participants Companies Staff Marketing Admin ToDo's						
Participant Info Detail Info Registration Sales Funnel Contact History Materials						
General Info Darden Admissions Darden Registrar Darden Career Services Darden Alumni Donations Memberships						
Darden Alumni Records for Gregory Ball						
Alumni Education						
Institution	Grad Year					
	2005					
Alumni Events						
Event	Date	Description	Organization	Place		
MBA CSC Conference	9/29/2005	Open event.				
Stanford Flatbridge Demo	9/29/2005					
Darden Holiday Party	12/22/2004	holiday party	Darden Solutions			
San Francisco Reception - Aug 17	8/17/2003	The Darden San Francisco Alumni Chapter cordially invites you and a guest to a luncheon on Sunday, August 17, 2003 11:00 a.m. — 2:00 p.m. Hosted by A. Lee Seward III (MBA '87) and Ruth Ann Seward 2730 Pierce Street San Francisco (415) 771-3912 Advance registration is required.	Darden San Francisco Alumni Chapter	Home of A. Lee Seward III (MBA '87) and Ruth Ann Seward		
Charlottesville Batten Lunch- Aug 6	8/6/2003	The Charlottesville Alumni Chapter cordially invites you to attend The Batten Institute's Darden Progressive Incubator luncheon on Wednesday, August 6, 2003, 12:00 noon. The Speaker will be Bruce B. Stouffer, MBA '89, Director of Real Estate Development, University of Virginia Foundation. The topic will be Breaking New Ground: UVA Research Moving Ahead. Lunch Provided	Charlottesville Alumni Chapter	Classroom 280		
New York Eve. Social - July 24	7/24/2003	The Darden New York Alumni Chapter cordially invites alumni and guests to an informal evening social gathering. This event is geared toward the Classes of 1998 through 2003, but all Darden alumni are welcome and encouraged to attend. There will be a 3-hour open bar and buffet. For further information, please contact Jennifer Murphy (212) 909-0043 or Jennifer.Murphy@Wachovia.com	Darden New York Alumni Chapter	Clancy's Pub		

- In addition to information being presented in the dashboard views, information about individual names (students, alums, speakers, companies, others) can be displayed
- In this example an alum's participation in alumni events is being displayed
- This information is a part of the 360-degree view of the alum and all of her interactions with the school, based on information in various applications used by the school

Dean's Office Studio's Technology

The Components Of The Dean's Office Studio

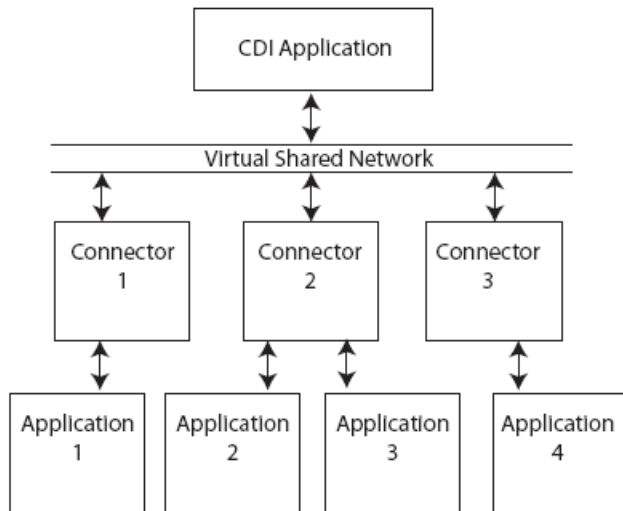


DOS Components

- Two data related elements
 - Data Management - The Dean's Office Studio has two primary data management elements
 - ✓ Customer Data Interface application
 - ✓ Application Connectors
 - Data transfer utility called the Virtual Shared Network application

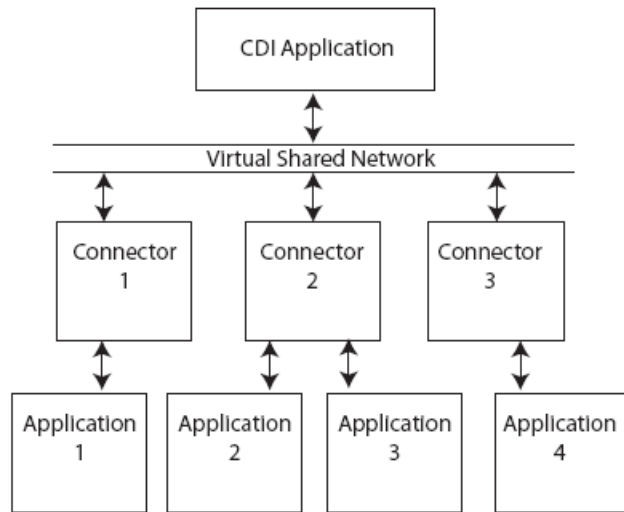
- CRM Toolset – is a rich tool set of communications and relationship management functions and features

What The Dean's Office Studio Technology Does



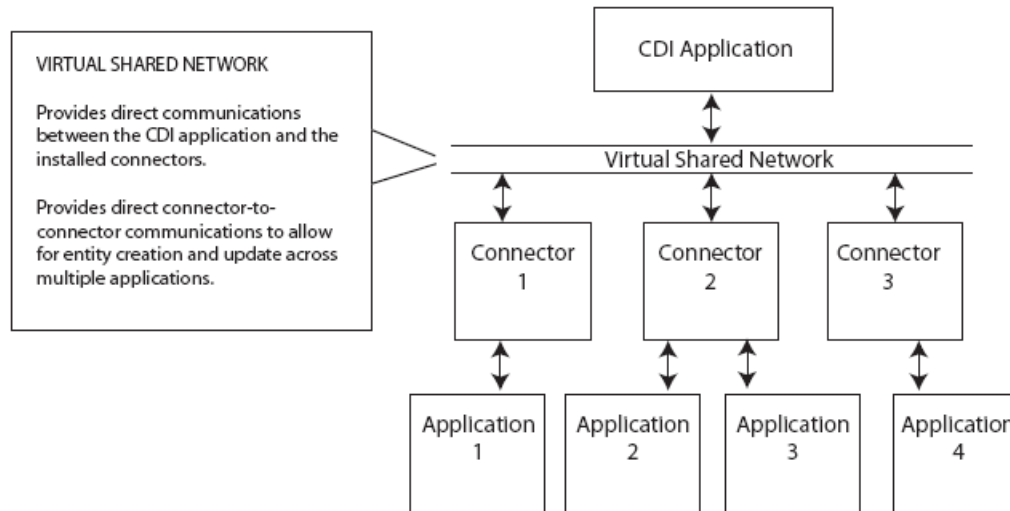
- The CDI Application interfaces with any number of installed applications via connectors in order to retrieve data from the applications and pass data to the applications from the CDI application
- A single connector may handle multiple applications
- A variety of technologies, such as xml, web services, database connections, etc. can be used to interface with the installed applications
- For bidirectional communications between CDI and the installed applications, appropriate code needs to be developed on the application side of the connector interface. While a number of standard applications are supported, custom application integration is undertaken on a custom basis
- The individual connectors support the transfer of data to and from the CDI application as well as manage the security context of each application with the CDI application
- The connectors also manage the complex task of entity identification using definable rule sets or shared keys to correctly identify an entity across all applications
- Clients can interface with the CDI Application using a generic connector which allows the downstream support of new applications
- A Connector manages: security, views to play up, single application data update rules, cross-application data sharing (create and update) rules, support cross-application reporting, import/export capability

What The CDI Application Does

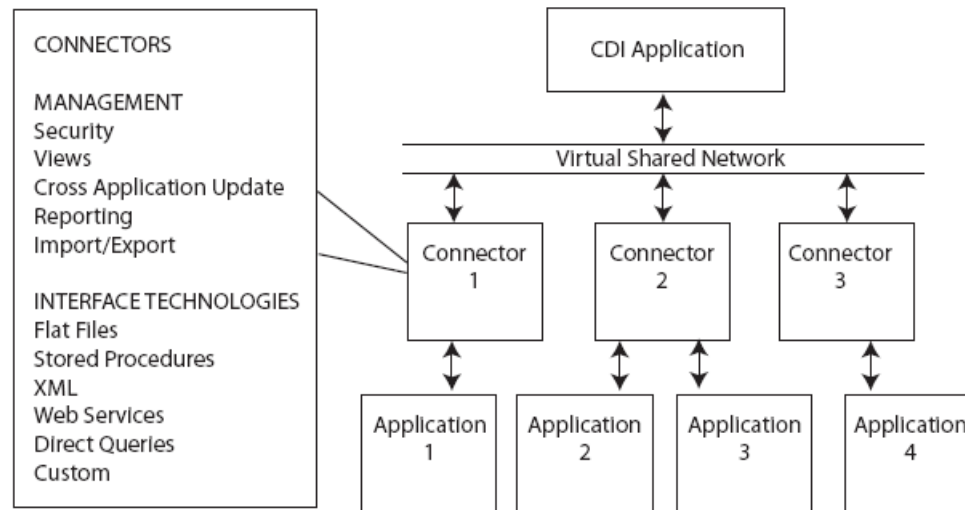


- This is an application capable of painting views from information in the data tables within the applications linked to it through the connectors
- It presents data associated with a single entity, i.e. one participant, one program, one target, one campaign, any one of which might have data in one or more of the linked applications
- It paints the views displayed in the interactive executive dashboard
- It provides the functionality to create cross-application reporting and the generation of direct marketing lists across applications
- It manages all the operations through which data is pulled, pushed and shared via the connectors across applications

The Role Of The Virtual Shared Network

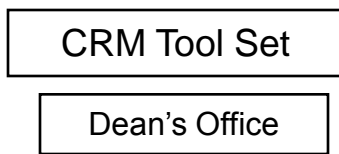


- The Virtual Shared Network allows for entity creation and updates between installed connectors. - If Application 1 creates a new entity with contact information, the system can be configured to automatically add the entity to Application 3. In this scenario, Connector 1 passes the new entity information to Connector 2 via the virtual shared network which calls the appropriate interface with Application 3 to perform the creation
- The CDI Application configuration files determine which updates and edits, if any, pass between the applications



- Connectors interface with installed applications to retrieve data for views and reports in the CDI application, manage security, allow for cross/application updates, and import/export data between applications
- A single connector may handle multiple applications. The application interface is built within the connector
- The connectors along with the CDI application support the complex task of entity identification using definable rule sets or shared keys to correctly identify an entity across all applications
- Clients can interface with the CDI application using a generic connector which allows the downstream support of new applications
- For bidirectional communications between CDI and the installed applications, appropriate code is developed on the application side of the connector interface. While a number of standard applications are supported, custom application integration is done on a custom basis

What The CRM Toolset Does



- Consists of functions and features supporting Customer Relationship Management (CRM)
 - Marketing, Communications and Event Management operations
 - Data for Marketing, Communications and Event Management representing its own operational efforts is maintained within the application and does not require “refreshing” from external databases
 - Data for overarching CRM is a mix of data originating within the application and data automatically imported periodically from other data sources in the college via the CDI, Connectors and Virtual Shared Network
- This set of CRM tools is for use by the Dean’s office personnel, not necessarily to be shared for use by members of other organization units

How The Ownership Of Data Is Managed

- Record Master
 - A record master is identified as an application which has the data of record for a given entity. The record master may be a single application or may be distributed across multiple applications. Record masters can have keys which are used to identify and access data by other applications. Rule sets can also be used to extract data from record masters.
 - Some applications will not have single record masters. For example, the customer marketing application contains the valid home address for some entities and the financial application contains the valid home address for other entities. In these cases, rule sets can be used to determine which entity contains the valid data.
 - Record masters are identified in the CDI application configuration file. This determines who owns the data and how data is propagated.
- Rule Sets - A rule set is a mapping or algorithm used to tie data together between applications. An example of rule sets are
 - An application uses the entity's SSN to look up home address information from the Record Master for Customer Data for an entity.
 - An application uses the entity's customer account # to look up billing information from the Record Master for Financial Data for an entity.
 - If the last activity date of the entity is within the past 3 years use Application 1 for home address, otherwise if there is an e-mail address obtain the address from Application 2, otherwise obtain the address from Application 3.
 - If the entity is not listed in Application 2 then use Application 3 otherwise use the SSN found in Application 2 to lookup the entity in Application 4.
- Customized Algorithms - Customized solutions allow for the arbitrary mapping of data across multiple applications in complex environments
- CDI Architecture supports all combinations of Record Masters, Rule Sets and Custom Algorithms. The most common combinations are presented in the following slides.

How Access Permissions Are Managed

- To integrate multiple applications from various vendors, security and access is maintained in the context of each application. Allowing each individual application to maintain its own security context avoids the creation of a complex security mapping from the CDI application to the vendor's application. The interface allows for any number of different applications.
- For each installed application, the CDI application will query or extract the security information for the application as specified in the interface type of the SECURITY_INFO section of the application configuration file. Applications which do not have security are not required to specify the SECURITY_INFO detail for that application.
- Each user within the CDI application will have specific roles which can be administratively defined by CDI. On the role assignment screen within CDI, the CDI roles will be presented followed by different assignable roles for each installed module. For instance, a user may have an ADMIN role within CDI, a MARKETING role with Application 1, a READ_ONLY role within Application 2 and an CREATE_READ role within Application 3. It is expected that across complex applications role names and types will be different. Each of these roles will be assigned via role assignment within CDI.
- When data is queried by a user to an application, the role information will be passed within the query to the application via the appropriate application connector. It is the responsibility of the receiving application to return the appropriate information based on the native role passed to the module. In this manner the CDI programmers are not required to have explicit knowledge of the underlying roles within each application.

How Data Verification Is Managed

- Administrative Tool
 - A CDI tool to allow administrators to scan multiple applications for matching records and report records which are not correctly resolved
 - Provides an administrative capability to override rule sets for any entity
 - Provides for record matching resolution with a time-stamp functionality
- Resolve on View - this resolution technique provides for administrative or user resolution when viewing entities. If multiple records in one application match the rule set requested by the CDI application, then the user can resolve on view to assign the correct record. The resolution is time-stamped, stored with user audit information
- Administrate on View - allows administrators to take action to resolve conflicts when viewing records
- Notify on View - provides an administrative notification when a user views a record with multiple record matches
- Warn on View - provides a warning to a user or administrator on viewing data when multiple records match an entity
- Customized Resolution - provides customized algorithms for conflict resolution

How Application Integration Is Accomplished

- Connectors
 - Connectors provide the interaction between the CDI application and other applications
 - Generic connectors can be used to allow clients to interact with the CDI application and play up their own views from their own application
 - Connectors can be reused across installations
 - Customized connectors will support major applications for integration
 - A connector can interface with one or more applications
 - Connectors can be distributed across multiple systems allowing for the integration of multiple technologies
- Generic Connectors
 - Generic connectors are provided with the CDI application
 - Used by developers to add views to the application
 - Allows for additional applications to be brought online after install without incurring customization fees
 - Generic connectors support multiple technologies
- Scalability
 - The CDI application supports an arbitrary number of connectors to interface with multiple applications
 - Applications can be brought online one at a time allowing for a controlled implementation

What Cross-Application Reporting Is Available

- The CDI application provides both breadth and depth to the reports/views generated in the Dean's Office Studio
- DOS presents a path to access data in the various applications linked to the CDI via the Connectors
- The import/export capability facilitates marketing, reporting, data mining analytics at the Dean's Office level and facilitates the export of data imported to the Dean's Office to connected applications, i.e. the Alumni Office can share list information for say marketing purposes from the Executive Education data tables
- In addition to its reporting capability, in web, pdf and Excel formats, the List functionality is also incorporated into the reporting section; with this functionality, complex cross-application lists can be generated for direct marketing purposes

What Cross-Application Reporting Is Available

[Custom Reports/Advanced Search - Participants](#)
[View Saved Reports](#)

Participant Fields

Full Name	First Name	Middle Name	Last Name	Nick Name	Title
Education	Alumni	Active	No Email	No Letters	HR Director
Address 1	Address 2	Address 3	City	County	State
International State	Zip	Country	Home Phone	Other Phone	Work Phone
Cell Phone	Fax	Email	Birth Date	Notes	Contact Person
Sponsor	Participant Referral	HR Person	Other Person	Interest Code	Update Date

Create Date

Custom Participant Fields

Educational Program

Event Fields

Name	Acronym	Public/Custom	Session	Start Date	Active
Cancel	Affiliated Company	# Registrations	# Cancelations	# Transfers	# No Shows
Registration Date	Create Date	Update Date			

Custom Event Fields

Program Text Field

Company Fields

Name	Parent Company	Division	Department	Occupational Code	Industry
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Invitation Funnel Fields

Offering	Funnel Status	Entry Date	Exit Date	Active
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Contact History Fields

Contact type	Date	Description	Campaign	Staff Member
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- After selecting an application and drilling in, the CDI provides access to the individual application's data tables, exposing the rich data sets for both reporting and direct marketing list generation
- Individual data elements, once selected, can be presented in both report and list forms
- These data elements from Application 1 can then be combined with those selected from Application 2 to provide a cross-application data table report/view or list

The Online Dean' Studio Demo Application

url = <http://dean.flatbridge.com/>

User Id. = contact us

Password = contact us

- The online demo is an open demo
- The online demo is available 24/7
- The online demo is the Confidential Information of flatbridge

Dean's Studio 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

➤ 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

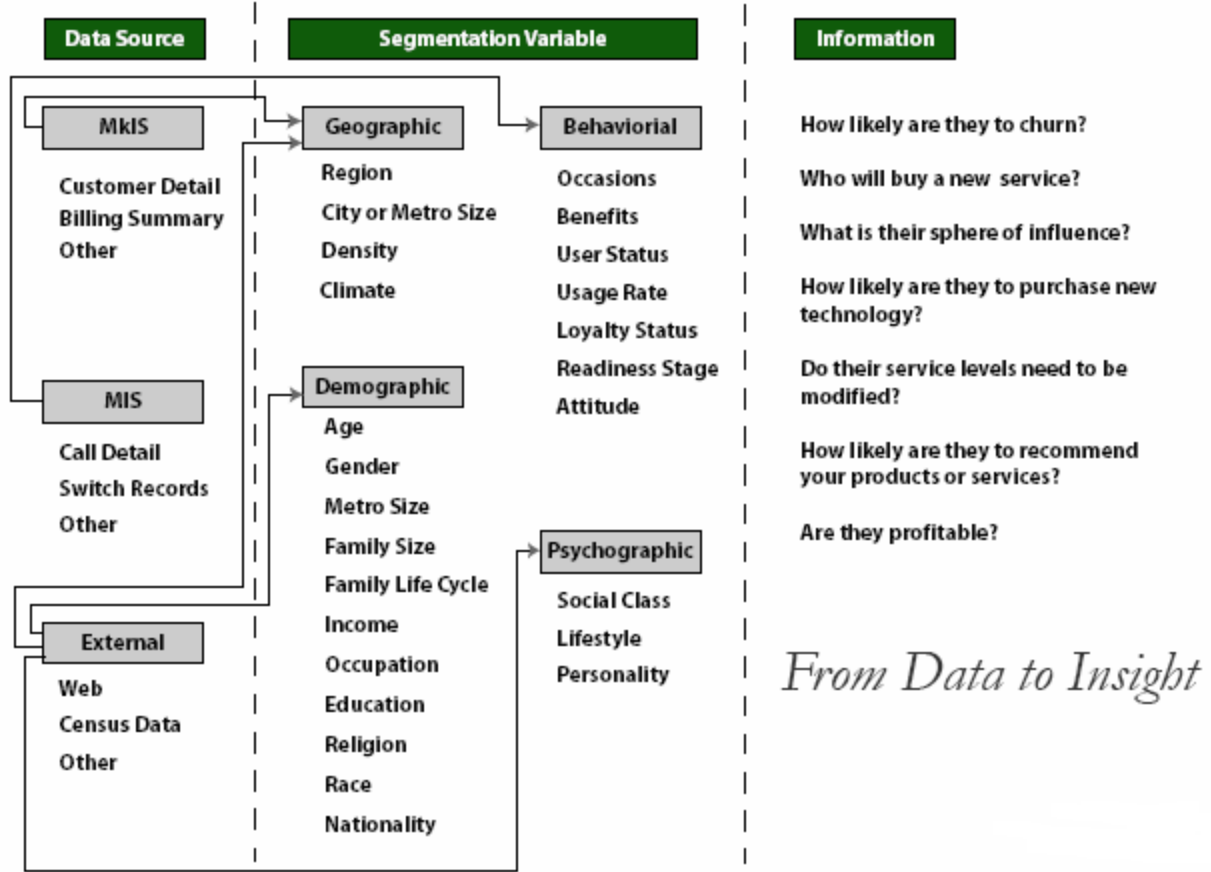
- APower Solutions, Inc. organized in 1997, after principals accumulated years of experience in education, data and business consulting, and technology
 - Alan Parker, Ph.D.
 - ✓ Extensive experience working with FORTUNE 1000 companies in implementation of web, data mining and knowledge solutions
 - ✓ 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.



From Data to Insight

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.

Dean's Office Studio

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