



INQUIRA

**Measuring the Effectiveness of
Professional Services**

Scott Brown, InQira

October 7, 2008

Measuring the Effectiveness of Professional Services

- 🔍 **InQuira Background**
- 🔍 **Professional Services Effectiveness through**
 - Implementation Role
 - Sales
 - Product Management
 - Support
- 🔍 **Professional Services Enablement**
- 🔍 **Professional Services Summary Takeaways**

Who is InQuira

Leading provider of *Intelligent Knowledge Applications* –

Providing superior customer service experiences through actionable capture, routing and delivery of your KM assets.



- Q Founded in 2002
- Q Headquarters in Silicon Valley, CA
- Q Offices in LA, NY, FL, London
- Q 70+ Customers worldwide
- Q 150+ employees

Key Partners

ORACLE

accenture

IBM



Our Focus



InQuira's solutions make people smarter by delivering fast accurate answers to all your customer-facing applications.

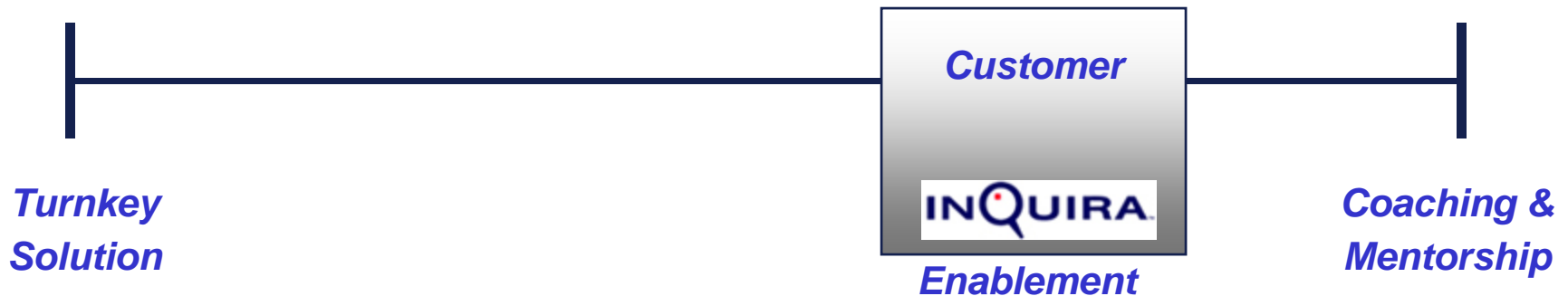
- ➔ **Understand / discover real customer Intent**
 - *language, industry, department, role*
- ➔ **Deliver the best possible Answer - customer experience**
 - *Accurate, relevant, personalized*
- ➔ **Collaborate across communities**
 - *Idea exchange, expert locator, forums*
- ➔ **Learn and refine**
 - *Trends, gaps, KPIs, feedback*



Professional Services Effectiveness



Professional Services Effectiveness Implementation Role



🔍 InQaira Works Through Enablement

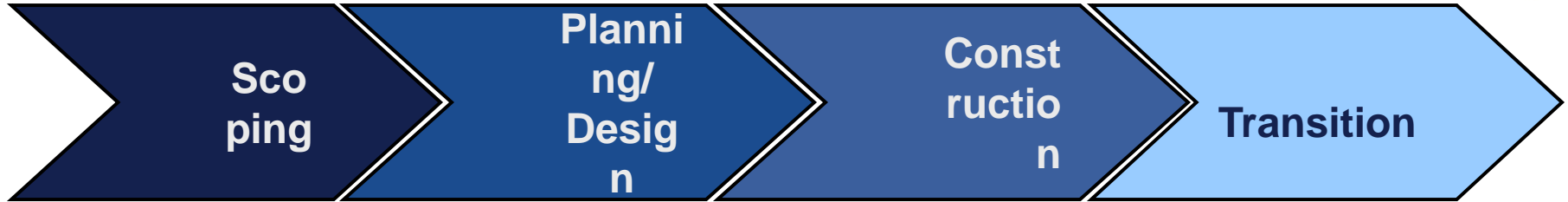
- Teaming
 - ✓ *Everyone has a partner*
- Approach
 - ✓ *Classroom Training*
 - ✓ *Hands-On Project Participation*
 - ✓ *Task Ownership by the End of the Project*
- Enablement Benefits
 - ✓ *Reduces Total Cost of Ownership through less Professional Services involvement in Future Phases*
 - ✓ *Allows Client team members to learn new technology*

Professional Services Effectiveness Sales Interaction

- Q **PS Organization Overview**
 - Phases
 - Role Estimates
- Q **High-Level Implementation Timeline**
- Q **Detailed Scoping Sessions**
- Q **Client Successes**



Professional Services Effectiveness Sales Interaction



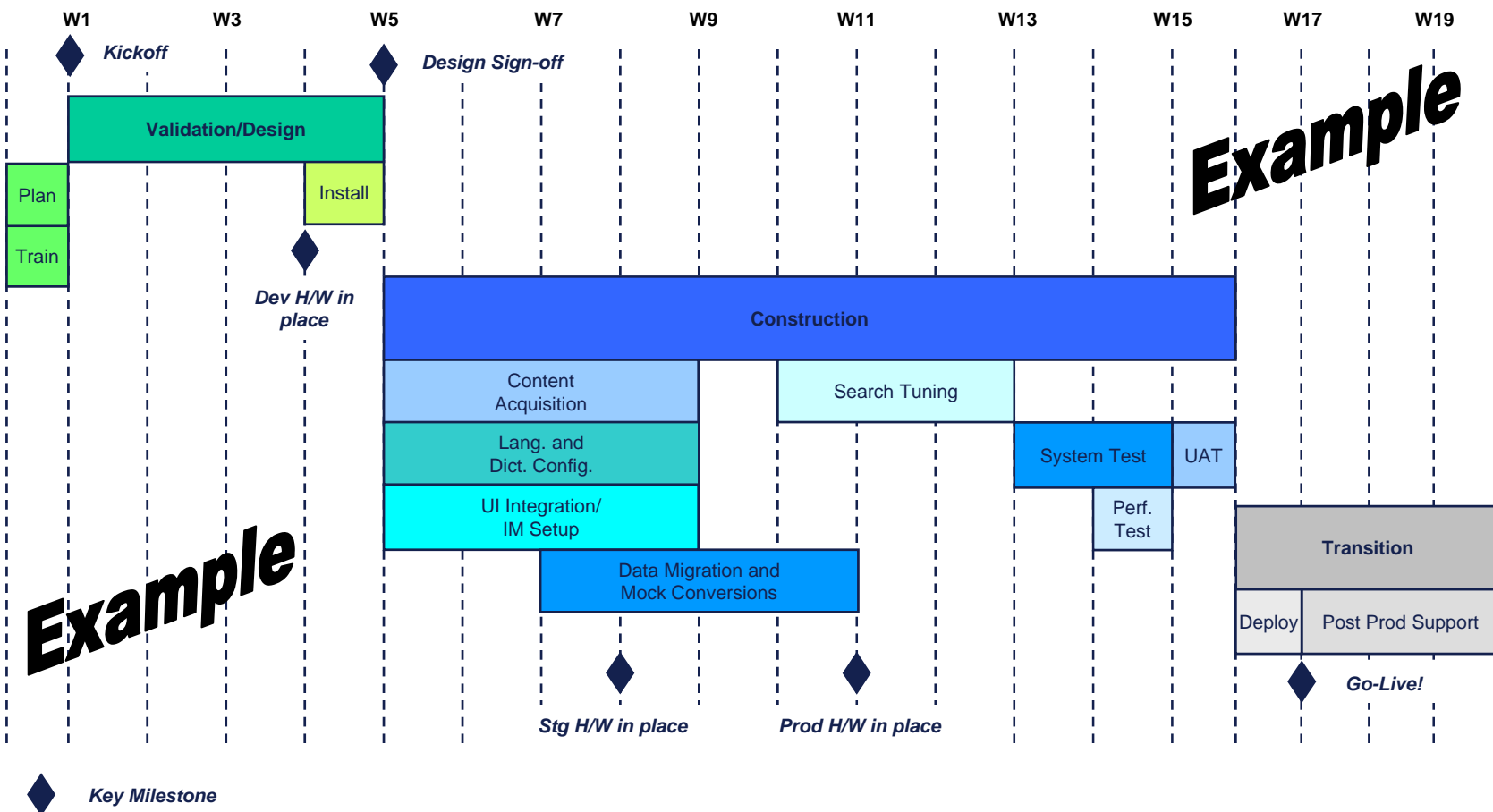
We are here

InQuira Role	Design	Construction	Transition
Project Manager/Solution Architect	100%	90%	50%
Technical Lead/Technical Developer	100%	100%	70%
Business Lead	50%	50%	30%
Information Manager Specialist	50%	50%	5%
Professional Services Director	10%	5%	5%

Customer Core Team Roles	Design*	Construction*	Transition*
Executive Sponsor	10%	5%	5%
Project Manager	100%	100%	25%
Technical Architect/Lead	100%	50%	15%
Application Developer(s) – InQuira (UI)	30%	30%	25%
Application Developer(s) – Security	20%	20%	10%
Business Lead/Dictionary Lead/Source Matter Expert	25%	25%	As needed
Network/Sys Administrator/DBA	10%	10%	10%

* Estimates by project phase

Professional Services Effectiveness Sales Interaction



Example

Example

Professional Services Effectiveness Sales Interaction

🔍 Goals for the Scoping Session:

- Reviewing the current Client Solution and Functionality
- Confirm Content Scope
 - ✓ *Content by Application, Size of Content and File types*
 - ✓ *Number of Users – Search;*
 - ✓ *Types of Users – Internal; External*
- Application Scope Review
 - ✓ *Search – Security (Content Access), User Interface, Facets, Managed Answers, Process Wizards and Language*
 - ✓ *Information Manager – Security (Content Authoring), User Interface, Content Channels and Workflows*
 - ✓ *Data Conversion*
- Training
- Implementation Details
- Final Q&A

🔍 Outcome of Scoping Session

- Document highlighting scope details, estimate of services and training fees and assumptions
- Detailed SOW upon confirmation of scope review

Professional Services Effectiveness Sales Interaction

“Thanks for recognizing the great partnership and efforts of the InQuira team. I'd like to echo your sentiments and thank the team for working so diligently on the project! It's been an awesome partnership! This is the most successful project I have been involved with at Apple.”

*Jeanne Toulouse
Apple - World Wide Customer Care*

“This was a tremendously well-managed project and though large in scope, it was brought in ahead of schedule. Fantastic teamwork across the board, especially between Support, IT and InQuira. Well done to the team.”

*Peter Sianchuk
Serena Software - VP Worldwide Support*

“Great teamwork under pressure! A big THANK YOU to the entire team - VeriSign and InQuira - you guys rock!”

*Jeff Brzycki
VeriSign – Chief Information Officer*

Professional Services Effectiveness Sales Interaction

🔍 Takeaways

- Details on Implementation Approach during the sales cycle establishes credibility with the customer
 - ✓ *InQira has a proven methodology for implementing their solution*
- Scoping Session
 - ✓ *Enables the PS team to provide a consultative viewpoint for scoping the customer's project based on experience*
- PS involvement earlier in the sales cycle requires management buy-in that can help reduce the sales cycle and increase the overall deal size

Professional Services Effectiveness Product Management Interaction

- 🔍 Design Phase Reviews
- 🔍 Custom Code Reviews
- 🔍 Implementation Troubleshooting Support
- 🔍 Roadmap Overviews



Professional Services Effectiveness

Product Management Interaction

🔍 Design Phase Reviews

- Participation by Product Management related to the application design including any integrations and customizations that may be required

🔍 Custom Code Reviews

- Ensures consistency across implementations that standards have been followed
- Details of customizations are understood and may highlight key functionality that needs to be developed

🔍 Implementation Troubleshooting Support

- Resources most familiar with the application code help resolve issues

🔍 Roadmap Overviews

Professional Services Effectiveness

Product Management Interaction

🔍 Takeaways

- Product Management involvement during the implementation helps reassure a customer that their implementation aligns with the company's future product direction
- Functional gaps are documented and can become part of the future Roadmap
- Roadmap overviews allow customers to:
 - ✓ *Prepare and plan for a multi-phase, multi-year implementation*
 - ✓ *Provide feedback on features and benefits*

Professional Services Effectiveness Support Interaction

- 🔍 **Bug Fix Resolution Process during Implementation**
- 🔍 **Documentation Reviews**
- 🔍 **Formal Transition Meetings**



Professional Services Effectiveness Support Interaction

- 🔍 **Bug Fix Resolution Process during Implementation**
 - Professional Services utilizes the process that the customer will follow for filing of bugs and acts as the advocate for the customer

- 🔍 **Documentation Reviews**
 - Design Specification and Operations Manual review and sign-off

- 🔍 **Formal Transition Meetings**
 - Professional Services to Support
 - ✓ *Includes review of outstanding issues, defects and feature requests*
 - Customer to Support coordinated by Professional Services

Professional Services Effectiveness Support Interaction

🔍 Takeaways

- Documentation Reviews
 - ✓ *Ensures verbal understanding of implementation is backed by written communication*
- Formal transition meetings provide the bridge between Professional Services and Support
 - ✓ *Support understands deployed application*
 - ✓ *Client becomes familiar with key personnel in Support*
 - ✓ *Process helps assess readiness*
- Customer can expect consistent level of interaction and understanding of their business
 - ✓ *Understanding of value proposition as it relates to implementation*
 - ✓ *Challenges and successes are understood*

Professional Services Effectiveness Enablement

- 🔍 **Collaborative culture across all groups**
 - InQuira team is focused on the delivery

- 🔍 **Management buy-in and support**
 - Realization that the cost is worth the outcome

- 🔍 **Internal Systems are leverage points during the implementation**
 - InQuira Knowledge Exchange
 - Customer Support Center

InQuira Knowledge Exchange (IKE)

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STAT533	Cap1 WWW Search Release 1

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EVNT3	InQuira Knowledge Exchange (IKE) - Overview for all InQuira users
PRJ15	BP10005 - BP Change Order - UI Post Prod
PRJ120	HITWD0003 - Hationwide Phase 2 - 8.0 Upgrade
PRJ14	GENE0006001 - GE Fanuc - R2.1 - 8.0.1 Upgrade (Implementation)
PRJ118	FARM0001 - Farmers KM Release 1
PRJ17	Southwest Airlines (SWA) Search Implementation
PRJ13	CapitalOne Release 1 (Get Answers)
PRJ12	QUAL0004004 - Qualcomm DotCom

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INGP36	2008 Org Chart 8/11/2008
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INQP4	InQira Travel Policy
INQP14	PTO Notification Protocol for InQira
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PRDM54	Product Roadmap, August 2008 (Internal Version)
PRDM53	draft powerpoint for edwin
PRDM52	Contextual Help - Research into display order for upload process
PRDM50	Contextual Help - Task Analysis
PRDM51	Sprint 6 Wireframes: Contextual Help
PRDM49	Contextual Help - Sprint 6 Review ppt
ENGR11	8.1.2.2 (Debian Linux and MySQL certification)
PRDM48	One-Year Product Plan (August, 2008 Announcement)

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PRDM29	InQuira 8.1.x Customers - Weekly Meeting Minutes
TPCI6	LIST OF ALL THIRD PARTY COMPONENTS AS OF MAY 2008.
PRDM14	Information Manager T3 MRD
PRDM11	End of Life Notice
PRDM22	MLD 8.1.0 Meeting Minutes
PRDM35	8.0.5 / 8.1.2 Documentation Plan
ENGR9	8.1.2 (MLD) Available for limited release only
PRDM9	Taxonomy Manager PRD
PRDM1	Test Drive PRD
PRDM47	Bring out your dead (BOYD) List

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SPRJ26	Verizon - VIBE custom prep code failed with java.lang.IllegalArgumentException: can't parse argument number
SPRJ25	GE - IM click thru URLs in search results use S: in front of the doc id, which means the unpublished/draft content should be displayed
SPRJ24	IDT Production Environment Access Details
SPRJ23	How to resolve Apache problem that causes CSC site to be non responsive
TMPL47	InQira's Official PowerPoint Template
SPRJ21	IDT Corporation
SPRJ20	Abbott Laboratories

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SPTP17	Product Help Process
SPTP5	InQira Support Customer Environment Info (includes listing of customers' InQira versions)
TMPL35	The Official Live Demo Site List
SPTP18	TestTrack Defect Process
SPTP4	InQira Test Track Cheat Sheet
SPTP6	Transition to Support process
ENGR9	8.1.2 (MLD) Available for limited release only
TMPL31	InQira Master License Agreement
ENGR3	8.0.4
SPTP7	User creation and/or password help for cssc.inqira.com or kbadm.inqira.com

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What version of InQira's products would you like to hear more about?

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- Product Defect Notification Procedure
- End-of-Life Policy
- Customer Support Programs

Additional Assistance

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- Training Programs
- Give us Your Feedback
- Help us plan InQira's upcoming User Event

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Professional Services Effectiveness Summary Takeaways

- 🔍 **Facilitate the consistent interaction with the customer across all groups within the company**
- 🔍 **Avoid the organization cliff syndrome**
- 🔍 **Enable customers to understand how the organization works together to deliver a quality solution**

Thank You!



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