





solutions

enterprise

software

•30 years old

•Owned by Activant (2005)

•\$400M, 2100 employees, +30K Customers, ERP publisher

- •\$15M, 78 employees, +2K Customers
- •Very profitable, stable, growth
- •Development tools, BI, Legacy Modernization

•Focus on productivity, operational efficiencies, managing by the numbers

•Corporate commitment to "delight" Customers



### About Speedware Support ...



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- •Profit Center / Business / P&L
- •Managed by the numbers
- •Worldwide / Multi-Lingual Support
- •Staffed with 19 Computer Science Engineers
- •Multi-Tiered Infrastructure (Front Line and Second Line)
- •BI/DT/Application Support
- In Acquisition Mode
- •Preparing our 7<sup>th</sup> SCP Audit



# **Does This Sound Familiar?**

- Much effort spent finding, analyzing and then transcribing key data from too many reports into Excel
- Inconsistent data from one report to the other
- Goals were not always communicated
- Were we really doing ok or not? "By the Gut"...
- Not many 'documented' processes
- At the mercy of IT...JTL!
- Growing pressure to improve margins









solutions

enterprise

software

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### Share, Share & Share...



solutions

software

- Take you on a little tour of a few "homegrown" Support dashboards:
  - How We Did
  - Operations
  - Customer Satisfaction
  - Timesheet
  - Financial
  - Electronic (SWS) Support
  - The Pulse of Support
- Discuss some of the lessons learned
- What this presentation isn't about...



# My only definition of the day...



software

- Dashboard / Briefing Board / 'Balanced' Scorecard --- Whatever!
- All these approaches to performance measurement have 1 thing in common:
  - An emphasis on the importance of measuring your organizational performance in ways that go beyond the limitations of the traditional reporting systems.
- The "Ideal" performance management system:
  - Energizes your people to focus effort on improving things that really matter
  - Gives people the information and the freedom that they need to realize their potential within their own roles
  - Aligns their contribution with the success of the company



# Differentiation, the Catalyst...



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- Strategic decision to make support a real differentiator in the Sales process
  - Adopted the SCP program to validate our practices and to identify areas of improvement
  - Focus gave us the momentum necessary to address long standing issues, and improve overall operations in the process
- When Miss Technology met Mr. Best Practice Processes...
  - Started getting out of the numbers reporting business and into the resolution of the "key" issues
  - Determined to make Support / my team / me →STRATEGIC!
- Re-certification continues to drive consistency in our operation and allows us to continuously improve





## Differentiation, the Catalyst...

Table 2 - SCP Benchmark Summary Results

SCP Certification Index	Center	SCP	Benchmark of SCP Certified centers
# Category Name	Scores	Mean	60 70 80 90 100 110 120 130 140 150
10 Oustomer Feedback	142.03	107.8	<u>│</u>
20 Service Delivery Processes	133.13	115.8	
30 Performance Metrics	131.57	106.4	
40 Training Programs	115.67	118.8	
50 People Programs	138.50	121.8	
60 Corporate Commitment & Strategy	121.00	123.1	
7.0 Productivity Tools	141.00	113.4	
80 Electronic Service Delivery	135.53	102.6	
9.0 Total Quality Management	98.00	107.9	
10.0 Research & Development Interface	111.80	112.6	
11.0 Sales and Services Interface	133.27	110.8	
	131.59	112.66	

### Make every measurement count!

For every dashboard, relevance to any of these 11 categories will be discussed...



# Differentiation, the Catalyst...



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- Get key players involved to ensure buy-in
  - Involve them in determining what it would take to be different / strategic – Make sure to show them what's in it for them...
- All measurements should have owners
  - Responsible for results as well as data accuracy
- Measure what "really" matters
  - Keep it simple to operate / simple to understand / simple to act on
    Make it show you WHTBD!
  - Discover the underlying reasons for good or bad performance
- Monitor regularly and COMMUNICATE progress...



### Support Scorecard 2006 - Operations



	Measure	enterprise	softwalearget solutions
FINANCIAL: How should we app	ear to our Owners?		
F1 Grow Support Revenue	Support rev.		\$xxM
F2 Deliver high degree of profit	<b>Gross Profit Margin</b>		80%
<b>CUSTOMERS:</b> How should we ap	pear to our Customers?		
COSTOMENS. Now should we ap	ipear to our customers:		
C1 Maintain SCP Certification	Certification		+2%
C2 Deliver world class support	Overall Sat.		8.0
C3 Shorten Solution Time	Solution Time		10 days
C4 Increase 1st Call Resolution Rate	1st Call Res.		25%
C5 Visit our top accounts	Trip from Maria		1 Per Q.
PROCESS: To succeed, at what b	ousiness process must w	e excel?	
P1 Enhance e-Service	1 Article/3 FAQ		Per Q.
P2 Customer intimacy	1 Share the Wealth		Per Q.
P3 Account Management	10 Calls		Per M.
P4 Increase Call Deflection	Deflection Rate		+10%
CPOWTH: How will we achieve w	sion and sustain ability (		>
GROWTH: How will we achieve vi			f
G1 Get in the know - Ensure t	ent has a copy of these g	oals	4hrs/month
G2 Benchmark our Centre – E	their cubicle – Progress	is	Per Q.
communi	cated to Staff and Execs	on a	rei u.
monthly			SPEE>WARE
October 2006			

### How We Did... Yesterday.



🚰 How We Did - Date: Year: 2006 -- Month: 10 -- Day: 06 - Microsoft Internet Explorer l de l 🗙 File Edit View Favorites Tools Help **.** 🚱 😒 ર 🎑 🖸 🖌 🎧 🛍 🚳 Measurement Drives Process Links **Drill down to** Edit Context View Data Close All Drill-Downs Print Help Logout 🐯 Backlog - Open Cases by Status & Team 🐯 # of Open Cases by # of Days Open see call owner SPW Waiting Client Waiting Escalation Total 90 days + 20 Backlog 150 NICC 10 N/A23 6 -1 to 10 days 37 61 - 90 days 5 -PRU by rep 7 N/A4 11 100 WJ. 6 1 8 18 and by 50 31 to 60 days 20 -AAC 3 N/A2 5 call 3 3 PMA N/A8 -11 to 30 days 26 - 0 status 🖉 Summary Calls and callbacks by Agent 🐯 Time Spent On Calls Res. Time Tel. Time Total 20 0 Indicators 20 n 6.67 hrs. 17 TAV 4.25 hrs. 1.83 hrs. 6.08 hrs. # of Call Backs 3 1 EDA 6 EDA. 3.67 hrs. 1.92 hrs. 5.58 hrs. 5.00 hrs. 11 # of Closed Calls 10  $\mathbf{MCO}$ 3.25 hrs. 0.25 hrs. 3.50 hrs. NICC 3 3.33 hrs. ELA 3.00 hrs. 0.08 hrs. 3.08 hrs. # of New Calls MCO1 2 1 1.67 hrs. SML 0.25 hrs. 2.17 hrs. 2.42 hrs. of New SR's 📕# of New 📕# of Close 📕# of Call B PRU 0.67 hrs. 0.08 hrs. 0.75 hrs. Ŧ 0.00 hrs. 0 Activity by # of New 🐯 # of New Calls By Source 🀯 Average Callback Response Time (in Minutes, by Day) product 20 0% 100 % 100 64 LASSIC SPEEDWARE 73 % 57 4 EM 54 53 34 18 % **BI** Application 3 WEB 23 TEL 9% MEDIA ¥ 11 10 06 05 04 03 02 First Contact Resolution Rate - Goal: 25% en in Real-Time (by Day) - Goal: 80% **Call Source** 0.0 % 10.0 % 20.0 % 30.0 % 40.0 % 50.0 % 80% 75% 36.4 % All Product Team 50% BI 50.0 % 0% 20.0 % 0% **Monitor SCP** DT 06 05 04 03 02 compliance dailv < > ē٦ 🚜 start 🔰 🕹 🙆 🤌 🞯 Inbox ... 🔄 http://... 🔄 My titl... 🎇 Suppo... 🕋 SQL S... 🦉 How ... 😂 Real Ti... Media ... 🐻 Summa... 🦉 SWS\_L... 😰 < 🎘 🖸 🔂 📶 4:33 PM Paperless – exception based Performance Management SPEEDWARE

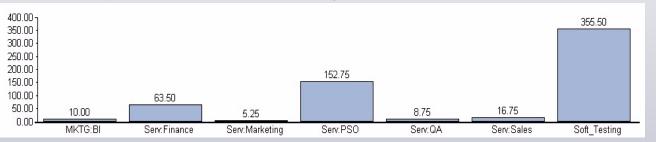
### Communicate...

From: Sent:	Silvia De Ciccio Wednesday, September 06, 2006 10:21 AM	enterprise	software	solutions
To: Cc:	Quebec.MTL. Quebec.ExecManagers		Daily to the Team and	the Execs:
Subject:	How We Did September 5, 2006		Dashboard link on yes	
	edware.com:88/MWSrvScript ne screen displays the day you are currently viewing. Please use the menu option "C	lick Here to	operational performan daily to staff and Exec	
	ould you wish to view a different day.			

This briefing board is refreshed daily and provides us with a glimpse on Support's vital signs from the previous day.

### Charge Backs: <a href="https://www.enablighten.com"></a> Charge Backs: <a href="https://www.enablighten.com">></a> Charge Backs: <a href="https://www.enablighten.com"></a> Charge Backs: <a href="https://www.enablighten.com">></a> Charge Backs: <a href="https://www.enablighten.com"/>></a> Charge Backs: <a href="https://www.

- YTD 2005, 1,326.75 hours of our technical expertise were charged back to the other departments.
- In February, 6 of our Reps spent some time consulting for PSO for a total of 152.75 hours... etc.



### Monthly to the Execs:

In monthly progress reports --- Give access to web dashboard for more info but cut&paste graph and editorial on specifics...

### Our performance dashboards are also used to communicate our progress:

•To the company at quarterly meetings

•To the customers via our newsletter, our web site, presentations etc.





## **About Operations Dashboard**

- Monitored on a monthly basis...
- Helps us manage the overall performance of our call taking / support activity.
- Slices and Dices:
  - Call Activity by month, year, product, agent, customer, call source, etc.
  - Solution time, response time, first call resolution etc. by month, year, product, agent, call source
  - Helps us with staffing issues.
  - And, much more...

### Make every measurement count

software

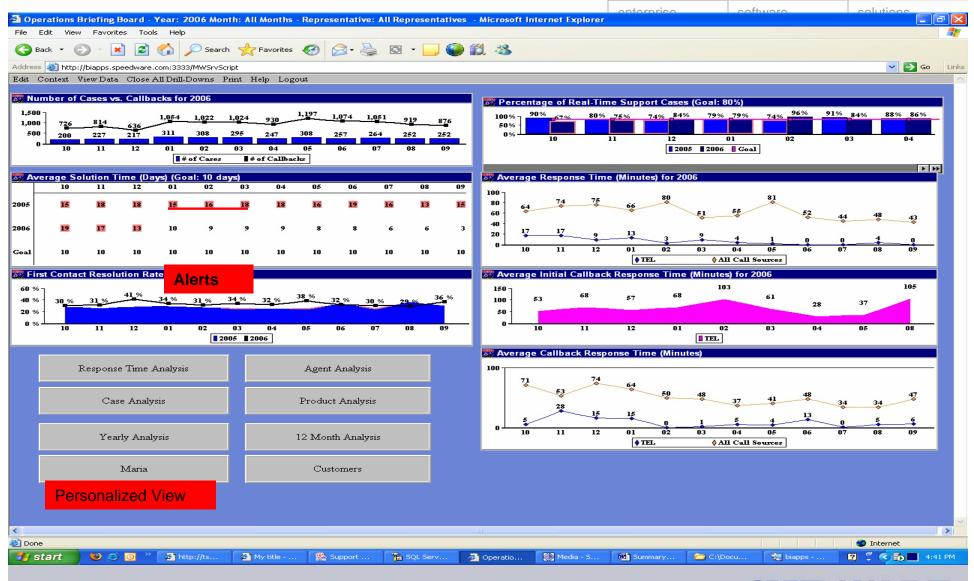
• Some SCP areas it affects;

- Employee Development/People Programs: Provides agent with feedback on his performance, identifies training needs, career development etc.
- R&D Interface: Which products generate most calls etc.
- Performance Metrics
- Productivity Tools
- Electronic Service Delivery
- Service Delivery Process: SLAs, goal setting etc.











October 2006



Operations Briefing Board - Year: 2006 Month: All Months - Representative: A	Il Representatives - Microsoft Internet	Explorer		- a 🛛
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Edit Context View Data Close All Drill-Downs Print Help Logout				
http://biapps.speedware.com: 3333 - 12 Month Analysis - Ending Month: All M	Aonths - Microsoft Internet Explorer			
Edit Context View Data Close All Drill-Downs Print Help				
Average Response Time	👿 Telephone Response Time (Goal:	80% within 5 Minutes)		
AVG. Response Time (Minutes)	Response Time within 2 Minutes		90.9 %	
Electronic 80	Response Time within 3 Minutes		90.9 %	
TEL 6	Response Time within 5 Minutes		91.0 %	
Average Initial Callback Response Time (Minutes)	Response Time within 10 Minutes		91.3 %	
AVG. Initial Callback Response Time (Minutes)	Response Time within 15 Minutes		92.1 %	
	Response Time more than 15 Minutes		7.9 %	
TEL 60	🐯 Electronic Response Time (Goal: 8	30% within 2 Hours)		
	Response Time within 30 Minutes		35.5 %	
🐹 Average Solution Time (Days) (Goal: 10 Days)	Response Time within 1 Hour		54.8 %	
AVG. Solution Time (Days)	Response Time within 2 Hours		76.2 %	
9,3	Response Time within 4 Hours		94.7 %	
	Response Time within 8 Hours		100.0 %	
5 First Contact Resolution Rate (Goal: 25%)	Response Time more than 8 Hours		0.0 %	
First Contact Resolution				
33.2 %	Response Time within 30 Minutes	oal 80% within 2 Hours)	49.4 %	
	Response Time within 1 Hour		68.8 %	
Real-Time Support (Percentage) (Goal: 80%)				
Real-Time Support (Percentage)	Response Time within 2 Hours		87.0 %	
89.0 %	Response Time within 4 Hours		96.1 %	
	Response Time within 6 Hours		100.0 %	
	Response Time by Priority (Goal:	95%)		
	Response Time for Priority 1		100.0 %	
	Response Time for Priority 2		82.9 %	
Last 12 months SCP stats	Response Time for Priority 3		95.9 %	
	Response Time for Priority 4		100.0 %	
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October 2006



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🗿 Operations Briefing Board - Year: 2006 Month: All Months - Representative: All Representatives - Microsoft Internet Explorer

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	185	142	216	216	190	217	N/A
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AUTOBAHN	13.1 %		AMXW	5	75.2 %	24
BI Application	8.3 %		CLASSIC SPEEDWARE	3	75.2 %	24.
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# **About Customer Satisfaction**



- Monitored on a monthly basis...
- Helps us manage the Customer Satisfaction results of our event based surveys.
- Slices and Dices:
  - Customer satisfaction components by month, year, product, agent etc.
  - And, much more...

### Make every measurement count

software

- Some SCP areas it affects;
  - Customer Feedback

- Employee Development/People Programs: Provides agent with feedback on his performance, identifies training needs, career development etc.
- R&D Interface: Which products generate highest satisfaction?
- Sales Interface: Are their top customers happy?
- Corporate Commitment: Profit Sharing, reference sites etc.



### SPEE WARE

### View survey

Call Number:	28	Date Closed:	1994/05/27
Company Name	Silvia De Ciccio	Customer Name:	Silvia De Ciccio
Telelephone	(514)747-9494 Est 8261		
Representative:	Silvia De Ciccio	Update call owner	

Call Summary: <u>Review call details</u> XEQ reports 'No such file or directory' for Makecat utility. On HPUX, XEQ gives the above error message leading one to believe that the location specified for Makecat is incorrect when, in fact, it is correct and the actual error is that a database cannot be found. GO produces the correct error message.

### **Overall Satisfaction**

Category	Expectation	Satisfaction
Overall Satisfaction		-

### Service Delivery

Category	Expectation	Satisfaction	Optional Comments (Maximun 250 characters)
Response Time			14 H
Solution Time	-		14 14
Quality of the Solution	-		(A)

### The Customer Service Representative

Category	Expectation	Satisfaction	Optional Comments (Maximun 250 characters)
Technical Skills			( ) ( )
Communication Skills			(H)
Professionalism			24 A
Helpfulness	-		

### Did the customer support you received on this call: Fal to meet your expectations.

Meet your expectations. Surpass your expectations.

Modify Miscellaneous Questions

I wish to speak to a Customer Service Manager about this call: 🗖

C

C

### General Comments



CHANGE NAME Silvia De Ciccio-(7773)

SUBMIT SURVEY

CANCEL SURVEY

E-MAIL CUSTOMER

### Event-Based Customer Satisfaction Survey

### Performed daily.

Analyzed monthly, unless customer requests a call back or if comments merit immediate attention.

A daily listing of all calls closed within the last 24 hours is generated and used as the basis for an automated survey on customer satisfaction.

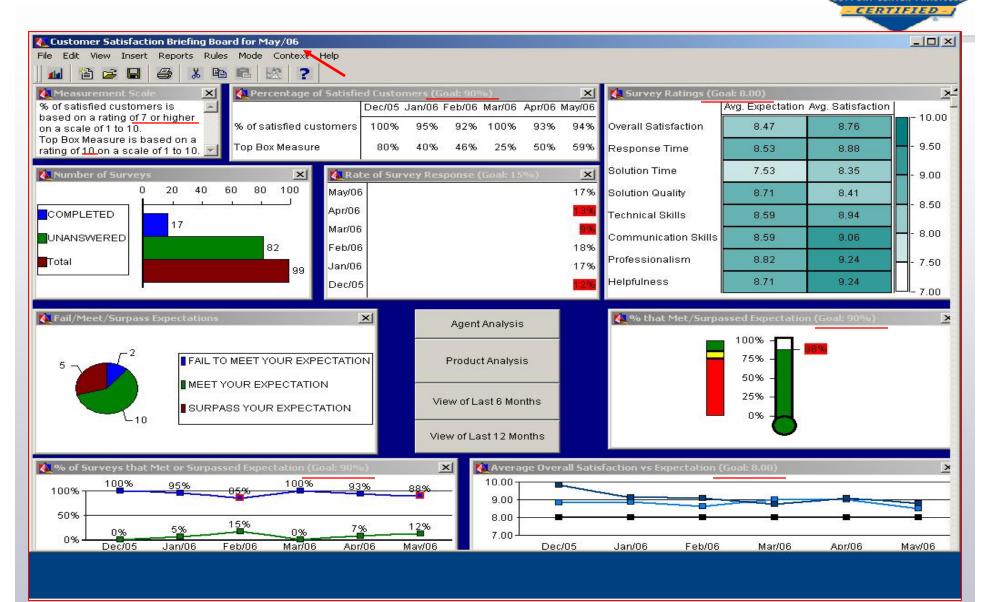
An e-mail including an overview and instructions on completion of the survey, and the URL to the web-based survey interface is generated and sent to the customer within 48 hours of the call being closed.

All support calls closed the previous day are eligible for the survey process.

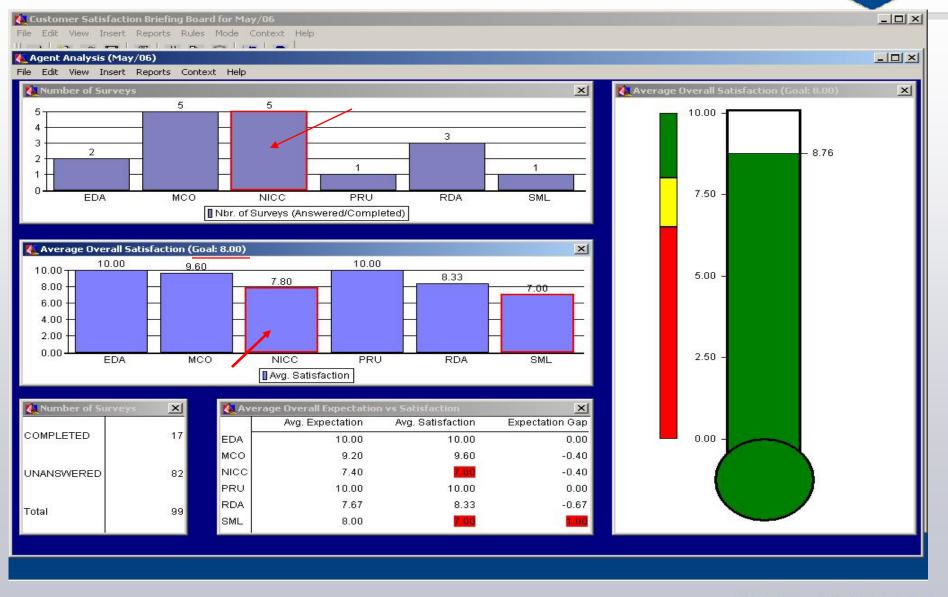
The Survey app also allows for any closed call to be immediately selected for survey by telephone. This is done to increase the likelihood of customer response when more detailed feedback is needed on a specific call.

This event-driven survey is also available from the Support Web Site.

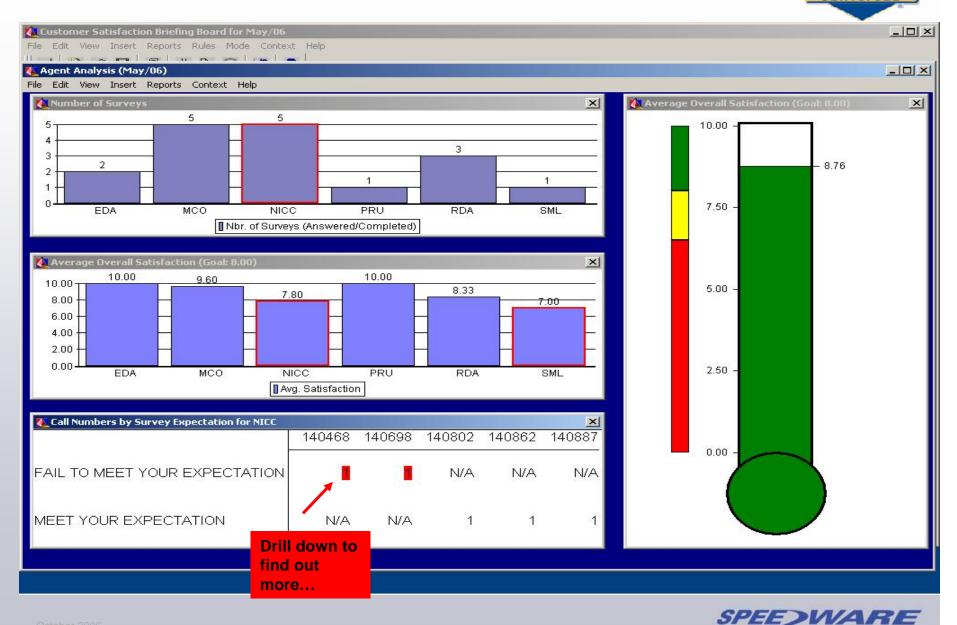
Customers wishing to complete a survey on any of their closed calls, bypassing our selection algorithm, can do so via the Call Management feature



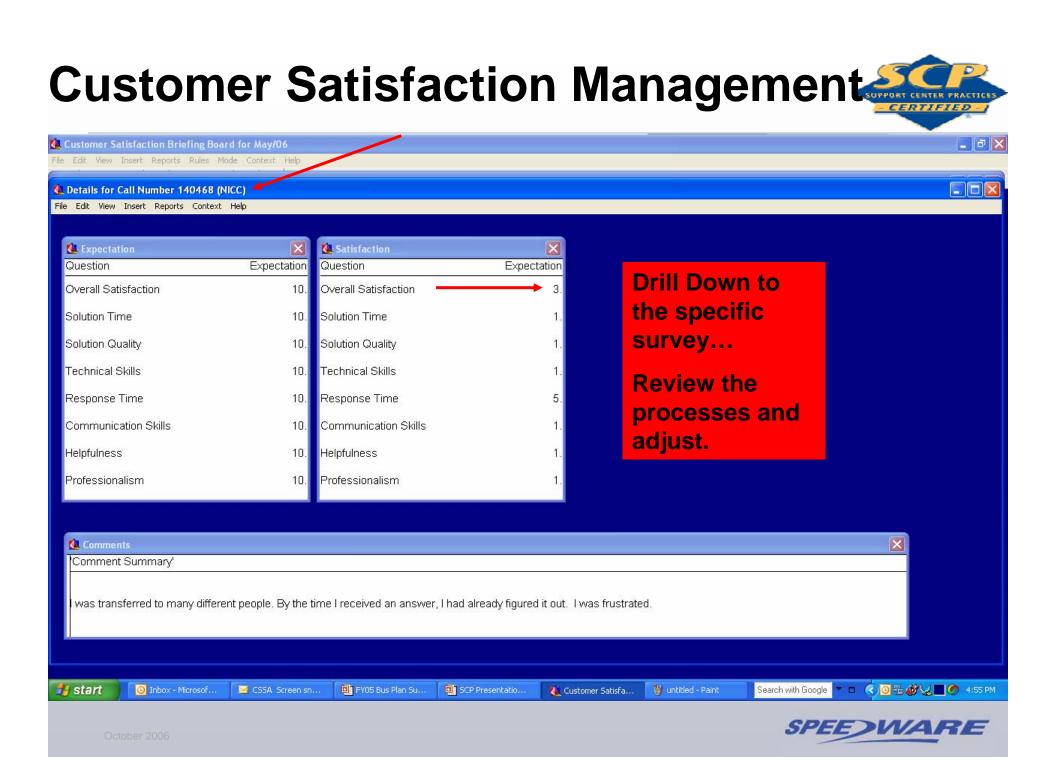


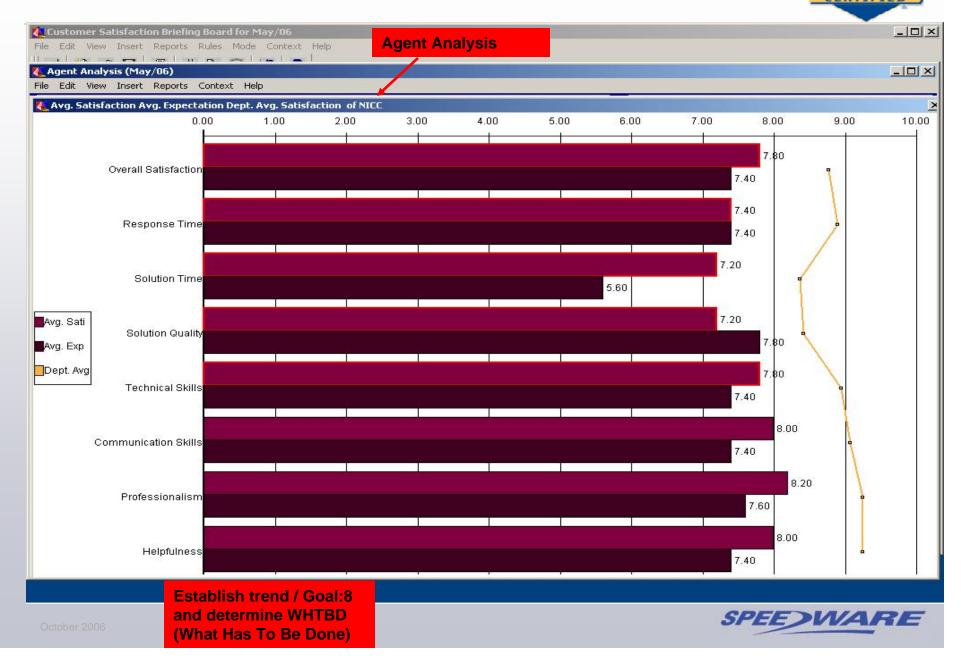












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echnical Skills    6%    NA    NA    NA    NA    18%    6%    6%    NA    NA    18%    6%    6%    NA    NA    18%    6%    6%    NA    NA    12%    18%    6%    6%    NA    NA    12%    18%    6%    6%    NA    NA    12%    18%    6%    6%    NA    NA    14    1    1    NA    NA    NA    2    3    10    17      ommunication Skills    6%    NA    1    1    NA    NA    NA    1    1    1    1    1    1	olution Quality	6%	NIA	6%	17%	NI/A	17%	6%	59%	Solution Quality	1	N/A	1	2	N/A	2	1	10	17
esponse Time ommunication Skills    NA    6%    6%    N/A    N/A    12%    18%    59%    Communication Skills    1    N/A    N/A    N/A    2    3    10    17      6%    N/A    N/A    N/A    N/A    12%    18%    69%    65%    1    N/A    N/A    N/A    2    3    10    17      6%    N/A    N/A    N/A    N/A    N/A    N/A    1    1    N/A    N/A    N/A    2    3    11    17      elpfulness    6%    N/A    N/A    N/A    N/A    N/A    1    1    N/A    N/A    N/A    1    1    1    N/A    N/A    1										Technical Skills	1	N/A	N/A	N/A	N/A	3	з	10	17
ommunication Skills    6%    N/A    N/A    N/A    N/A    12%    18%    65%    1    N/A    N/A    N/A    N/A    1/2    3    11    17      6%    N/A    12    17      6%    N/A    12    17      6%    N/A    12    17      6%    N/A    N/A    N/A    N/A    N/A    N/A    N/A    N/A    N/A    12    17      6%    N/A    N/A    N/A    N/A    N/A    N/A    N/A    12    17      6%    N/A    N/A    N/A    N/A    N/A    N/A    12    17      743    University of East Anglia    Ritchard Woods    10    10    10    10      7464    Williams Bros. Lum	echnical Skills	6%	N/A	12000000000	N/A	N/A				Response Time	N/A	1	1	N/A	N/A	2	з	10	17
elpfulness    1    N/A    N/A    N/A    N/A    N/A    1    1    N/A    N/A    N/A    1    1    1    1    1    N/A    N/A    N/A    1    <	esponse Time	N/A	6%	6%	N/A	N/A	12%	18%	59%	Communication Skills	1	N/A	N/A	N/A	N/A	2	3	11	17
elpfulness      6%      N/A      N/A      N/A      N/A      N/A      24%      71%      Professionalism      1      N/A      N/A      N/A      4      12      17        rofessionalism      6%      N/A      N/A      N/A      N/A      N/A      N/A      1      N/A      N/A      N/A      4      12      17        rofessionalism      6%      N/A      N/A      N/A      N/A      N/A      24%      71%      Total      6      2      2      3      6      13      21      83      136        rofessionalism      Caller      Caller      Caller      Richard Woods      10      743      10      743      10      7443      10      7444      10      10      10      10      10      10      7468      LeGroupe Christic Lefe      France Rodrigue      10      10      10      10      10      10      10      10      10      10      10      10      10      10      10      10      10      10      10 </td <td>ommunication Skills</td> <td>6%</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>12%</td> <td>18%</td> <td>65%</td> <td>Helpfulness</td> <td>1</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>N/A</td> <td>4</td> <td>12</td> <td>17</td>	ommunication Skills	6%	N/A	N/A	N/A	N/A	12%	18%	65%	Helpfulness	1	N/A	N/A	N/A	N/A	N/A	4	12	17
Customer ratings on overall satisfaction    ×      Survey no.    Company    Caller    Rating      7435    University of East Anglia    Richard Woods    10.      7443 VOPAK Logistics North America Inc.    Bill Wimberley    10.      7464    Williams Bros. Lumber Company    Jesse Overly    10.      7483    Library Bound    Paul Clarke    10.      7483    Library Bound    Paul Clarke    10.      7483    Softvoyage    Pierre Morin    10.      7500    QVC PSO    Ric Goldman    10.      7501    Lockheed Martin Canada    O'Neil Brooke    10.      7510    Lockheed Martin Canada    O'Neil Brooke    10.      7511    Losts the 17    Surveyed customers    748    Arkansas Blue Cross Blue Shield    Rusty Wyrick    8.      8    T488    Arkansas Blue Cross Blue Shield    Rusty Wyrick    8.    8.      7541    Kamos Suply Corp. of Boston    Carolyn Taranto    7.    7.      7452    CANNEX Financial Exchanges Ltd    Steven Waters    7.    7.      7451    Mendocino College <td< td=""><td>lelpfulness</td><td>6%</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>24%</td><td>71%</td><td>20 00 10 100 10000</td><td>1</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>N/A</td><td>4</td><td>12</td><td>17</td></td<>	lelpfulness	6%	N/A	N/A	N/A	N/A	N/A	24%	71%	20 00 10 100 10000	1	N/A	N/A	N/A	N/A	N/A	4	12	17
Customer ratings on overall satisfaction    X      Survey no.    Company    Caller    Rating      7435    University of East Anglia    Richard Woods    10.      7444 VOPAK Logistics North America Inc.    Bill Wimberley    10.      7468    Le Groupe Christie Ltee    France Rodrigue    10.      7489    Softwoyage    Pierre Morin    10.      7489    Softwoyage    Pierre Morin    10.      7500    QVC PSO    Ric Goldman    10.      7501    Lockheed Martin Canada    O'Neil Brooke    10.      7510    Lockheed Martin Canada    O'Neil Brooke    10.      7438    Eagel Informatica, S.A.    Vicente Sanchez    9.      7439    Bell Business Solutions    Claude Garceau    8.      7439    Bell Business Solutions    Claude Garceau    8.      7439    Amsas Blue Cross Blue Shield    Rusty Wyrick    8.      8    Arkansas Blue Cross Blue Shield    Rusty Wyrick    8.      7439    Amplenol Canada Corp.    John Pastor    7.      7542    CANNEX Financial Exchanges Ltd    Steven Waters    <	rofessionalism	6%	N/A	N/A	N/A	N/A	N/A	24%	71%	201 00000	6						21		100000000
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		custo	mer																



October 200

satisfaction

# **About Financials Dashboard**

- Monitored on a monthly basis...
- Helps us manage the financial side of support revenue and segments our customer base.
- Slices and Dices:
  - Customers by year, product, revenue, calls, supporting entity etc.
  - Segments our customers by revenue categories to help us tailor programs accordingly etc.
  - Segments revenue by type of transaction.
  - And, much more...

### Make every measurement count

enterprise

software

solutions

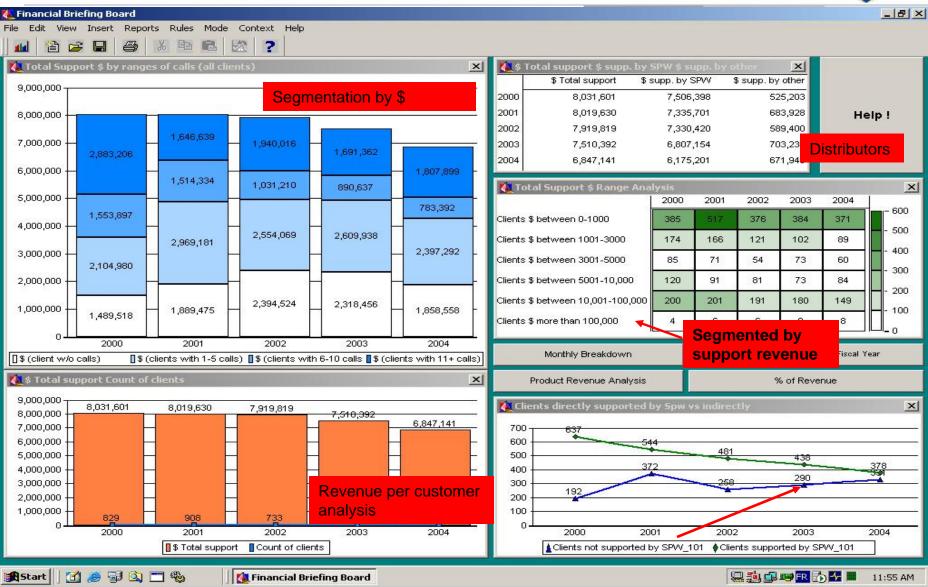
- Some SCP areas it affects;
  - R&D Interface: Understanding of product distribution in base.
  - Which products generate most money and/or more calls?
  - Performance Metrics: Revenue per call...
  - Financial Management
  - Corporate Commitment: Monitor revenue trend, attrition, growth and understand why.



### Financial Management Examples



SPEEDWARE





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### 🌉 MEDIA - Multiple Details of 2003 of \$ Total support

File Edit View Insert Reports Context Help 🚺 \$ Total support for other supporting office: × 🚺 \$ Total support for All offices × 90,000 Amisys LLC 10,000,000 JF Infosys GmbH 79,184 Infotool Computer S.L. 7,500,000 - 7,510,392 ESI Informatica 52,863 - 80,000 5.000.000 Pathway Pacific Pty. Ltd. 2,500,000 Carter - Pertaine, Inc. 43,512 ABC Group AS 39,201 0 - 70,000 Altatec Propuestas Informaticas Ltda 35.798 22,966 MD Applikation 17,493 Jobscope Corporation 🎑 Count of clients (all supp. offices) × 16.663 Brime Technologies Espana S.L.U. - 60,000 Other 16 -Unycorp S.A. De C.V. 15,799 13,220 Delta Teamco A/S 13,100 Leuter Warehouse Logistics BI 306 Advanced Systems Research & Dev. S.C. 10,778 - 50,000 WA Informatica Consultoria e Comercialização 10,292 Prose 9,840 Grupo Lanka, C.A. 7,800 DT 452 40,000 Novio Vision 7.628 Mapics 7,313 Infocentre Limited 5,729 Radius Solutions Ltd 5.512 30,000 Ross Systems, Inc. 4,826 × K Count of clients Vergani y Asociados S.R.L. 4,417 AMXW 6 Autobahn 64 Telecomputer Center S.A. 4.364 Easyreporte 103 Policy Studies Inc 3,651 20,000 DT Consulti 1 Fleet Software Limited 3,233 House 9 SPL Limited 3,156 Breakdown of DT Omnidex 31 Open Business Solutions 2,750 - 10,000 IBAWare Tecnologia de Informatica Lda 2,152 Visual SPW 76 -SAG Systemhaus GmbH 1,869 Classic SP 341 Software AG Spain 1,413 TJ Systems 839 - 0





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### 🌉 Monthly Breakdown

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Comments	×	1 🚺 Tot	al Support \$		×	⁄ \$ Total su	oport of BI		×	🚺 \$ To	tal support	of All less BI	×
Fiscal month 1 = Oct			2001	2002	2003	200	0 2001	2002	2003 🔺		2001	2002	2003 🔺
Fiscal month 2 = Nov		01	650,351	643,242	577,555	01 125,67	0 143,190	157,979	118,523	01	507,161	485,263	459,032
Fiscal month 3 = Der Fiscal month 4 = Jar		02	영화한 값이 성격을 위해 들었다.	전 친구 다양 승규가 감정하는 것이 좋아.		02 124,99		160,402		02	505,715	485,320	447,894
Fiscal month 5 = Fet		03		100		03 126.62		161,359	A 65 (	03	505,066	485,131	446,523
Fiscal month 6 = Mai	irch	04		033032230		and a second and	1965 - Mileson C.	1996 I. 1. 1. 10 00 00 00 00 00 00 00 00 00 00 00 00		04	491,791	479,359	441,962
Fiscal month 7 = Apr		05	•	•			St. 15.25335	149,591	2.50% • CO 15 0	05	487,744	473,293	442,619
Fiscal month 8 = May Fiscal month 9 = Jun	·	06	이상 방송가 있다. 성장님 등 말	사람이 많은 것은 것이 같은 것이 같이 없다.	550 040 L	05 139,47	Der i Vermiter eine	146,913		06	485,084	477,001	439,700
Fiscal month 10 = Ju		07	1. 사망감 관계가 다가 걸 수 있다		554 007 L	06   139,68	SH 4512553		111,218	07	489,908	478,176	439,419
Fiscal month 11 = Au	ugust	08	1.1	28	546,079	07 141,40	2 164,431	145,531		08	486,938	476,831	436,089
Fiscal month 12 = Se	eptember	09	정말 감사 나라 가슴이 걸려.		549,954 (	08   135,39	6 162,767	143,444	109,989	09	480,938 489,840	470,831	438,987
We limit the analysis	to fiecal	10	2010/01/2017			09   135,29	163,159	133,294	110,967	10	489,840 484,053	482,184	
Year 2000 and up.	to liscal	11		100	565,906	10   138,42	9 166,908	122,520	117,716	11		(R)	448,190
		1202	The second second	102233 <b>3</b> 306330	533,473	11   139,16	9 162,429	122,187	117,572	12	475,508	467,879	415,901
		12	636,256	595,618	542,840	12 142,29	6 158,978	123,343	119,671	12	477,278	472,275	423,169
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Add on Add on Administration Currency difference Increase price New support	scal Year 200 01 37,983 338 3,367 36,397	( 37,00 23 3,20 34,69	02 03 01 40,513 38 271 09 3,211 34 34,186 54 10,441	04 27,319 650 3,169 28,832	05 05 34,000 213 3,171 27,106	06 06 32,559 250 3,150 25,080	07 29,530 338 3,132 24,258	27,936 513 3,096 21,245	09 27,255 250 3,118 20,984	29,1 4 3,1 21,8	10 33 28,7 50 51 2,8 367 27,4 333 15,7	11      12        724      27,412        0      413        300      2,870        400      28,003        724      16,844	Z Total 2 379,366 3 3,921 0 37,435 5 330,056 4 159,596
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Support Revenue Analysis



October 2006



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<b>(1</b> Tot 9,00	al Support \$ by ranges				×	2000 2001	Total support \$ supp \$ Total support 8,031,601 8,019,630	. by SPW \$ s \$ supp. by 7,500 7,335	SPVV \$\$ 6,398		203		
7,00		1,646,639	1,940,016	1,691,362	- 1,807,899	2001 2002 2003 2004	7,919,830 7,510,392 6,847,141	7,330 7,330 6,807 6,175	0,420 7,154	589, 703, 671,	400 238	H	elp !
5,00	0,000 - 1,553,897	1,514,334	1,031,210	890,637	783,392	Client	stal Support \$ Range	21	000 2001 85 <b>517</b>	2002	2003	2004	- 600 - 500
10.000000	0,000 - 2,104,980	2,969,181	2,554,069		: How much ed no calls?		ort revenue is		20 91	81	102 73 73	89 60 84	400 300 200
1,00	0,000 1,489,518	1,889,475	2,394,524	2,318,456	1,858,558		s \$ between 10,001- s \$ more than 100,00		00 201 4 6	191 6	180 8	149 8	- 100
_	<mark>lient w/o calls)</mark> [] \$ (o otal support \$ (clients \$ Total su	with calls) \$ (clie			lients with 11+ cal	F	Monthly Breakdow Product Revenue Ana		Suj	pport Rever % (	nue Type of Revei		'ear
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October 2006

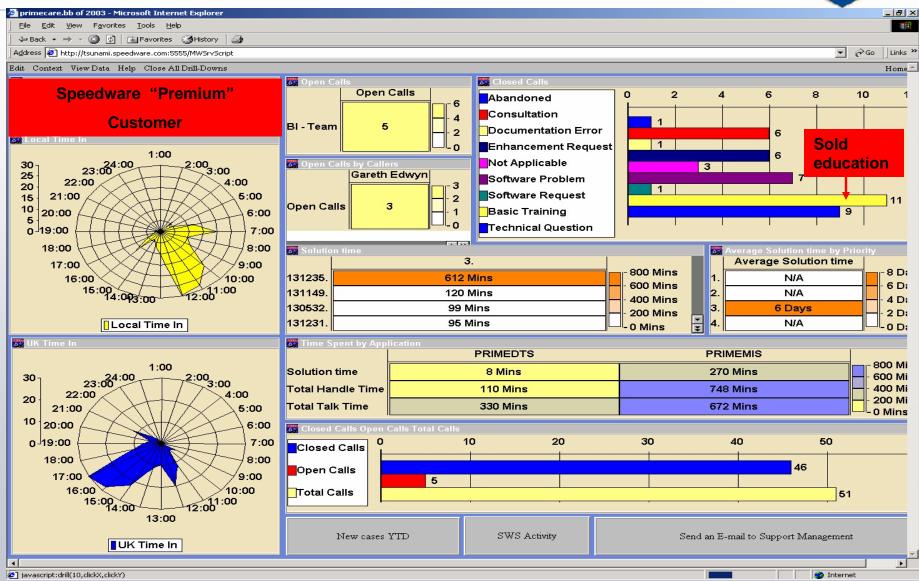


🌉 \$ (clients wit	th calls) \$ (client w/o calls)				×
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40%	19%		30%	How d	
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1,400,000	1,232,275	1,324,355	<u> </u>	don't u <sup>1,03<u>9</u>,141</sup> vour	
1,000,000		674,271	736,254	<u>1,039,141</u> your <u>650,225</u> service	
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BI	2000	2001 <b>S</b> (clients wit	2002 th calls) 📲 \$ (client w/o calls)	2003	2004
🊺 \$ (clients wil	th calls) \$ (client w/o calls) of [	эт			×
6,000,000 5,000,000 4,000,000	5,305,495	4,800,900	4,385,801	4,149,899	3,90 <u>5,517</u>
3,000,000	1,091,179	1,214,630	1,657,382	1,668,126	1,478,055
DT	2000	2001	2002	2003	2004



### Pass it on to the Customer...







## **About Timesheet Management**

- Monitored on a monthly basis...
- Helps us manage the off call activities of our agents.
- Slices and Dices:
  - Time spent on activities by month, year, agent, activity type, team.
  - Helps other departments identify staffing needs.
  - Helps manage / understand cost / margins.
  - Helps monitor education reqs.
  - Helps drive processes.
  - And, much more...

### Make every measurement count

software

solutions

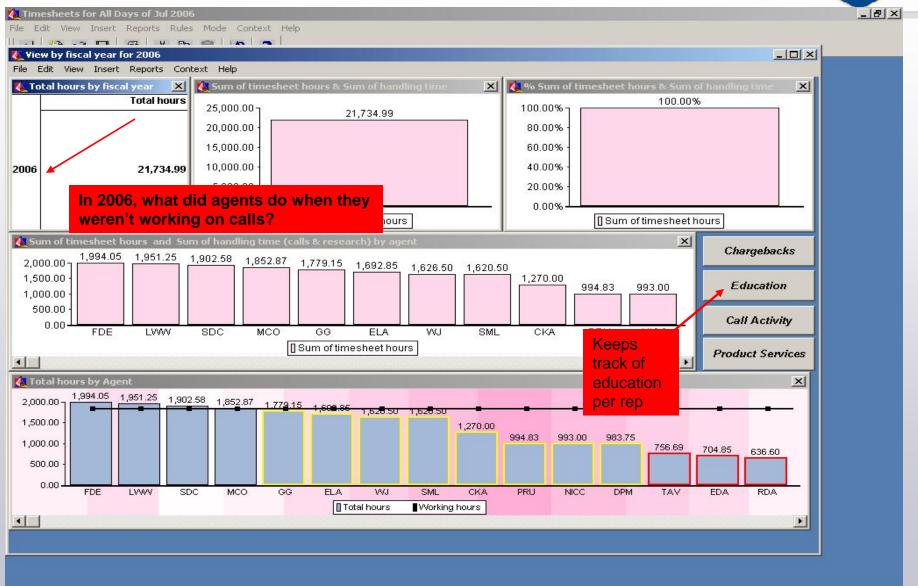
• Some SCP areas it affects;

- R&D /Sales Interfaces:
  Relationship building. Help with Margins.
- Employee Development/People Programs: Diversity of tasks helps with retention / career development.
- Financial Management: Margins
- Corporate Commitment: Monitors
  / identifies staffing need etc.



### **Timesheet Management**

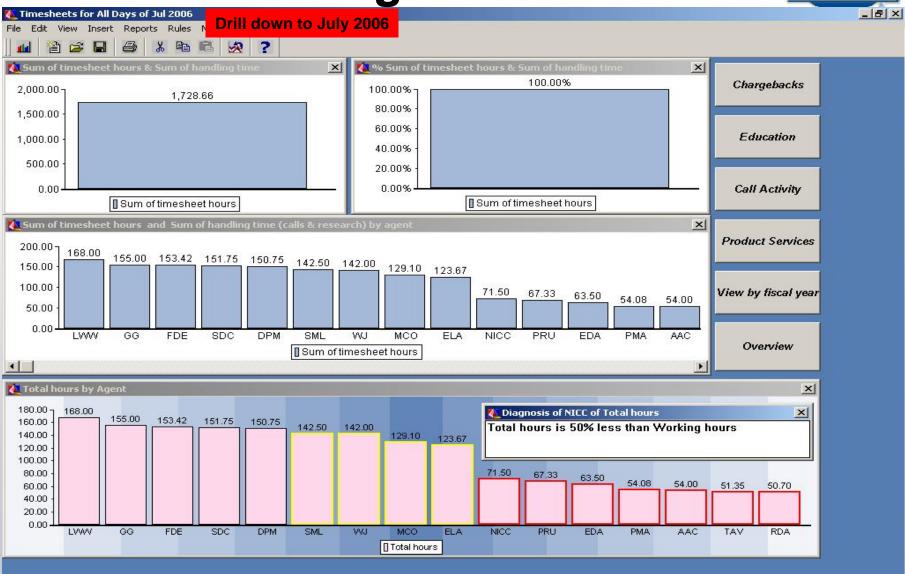






### **Timesheet Management**







### **Timesheet Management**



🚺 Timesheets for All Days of Jul 2006 \_ 8 × File Edit View Insert Reports Rules Mode Context Help 🌉 Chargebacks for All Days of Jul of 2006 File Edit View Insert Reports Context Help 🚺 Charge back hours by CostFunction Tasks that could be charged × back to the other departments 254.50 300.00-233.42 200.00 PSO details 100.00 16.78 0.25 0.00 Serv:PSO Serv:RD Serv:Sales Soft\_Testing 🚺 Sum of timesheet hours (Chg.Bck.) of All Months × 7,432.35 8,000.00 6,444.38 6,000.00 Monthly View 3,582.59 3,581.38 4.000.00 2,996.71 2,000.00 0.00-2002 2003 2004 2005 2006 🚺 Sum of timesheet hours (Chg.Bck.) × 600.00-421.45 400.00 200.00 77.50 6.00 0.00 Management Tech-Centre BI Tech-Centre DT 🚺 Sum of timesheet hours (Chg.Bck.) × 120 105 96 92 100 78 80 64 60 44 40 15 20 Б б n DPM ELA FDE LWW MCO PRU SDC SML TAV



## **Timesheet Management**







## **About SWS Dashboard**



- Monitored on a monthly basis...
- Helps us manage the use of our Support Web Site (SWS) and understand how it adds value...
- Slices and Dices:
  - Activities by customers by year, product, revenue, calls etc.
  - Identifies who downloads software, accesses Knowledgebase etc.
  - Helps understand call deflection.
  - And, much more...

#### Make every measurement count

software

- Some SCP areas it affects;
  - Electronic Services.

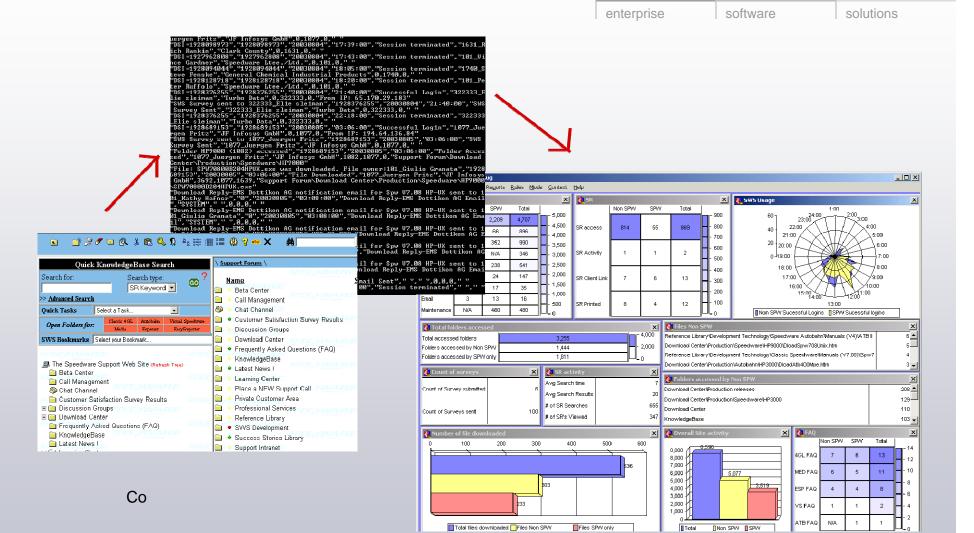
enterprise

- Productivity Tools.
- Which products generate most interest/activity?
- People Programs/ Employee
  Development: Affects job
  descriptions profit sharing plan
   performance etc.
- Financial Management: Customer retention / Renewals / Collections etc.
- Customer Feedback: Surveys.



#### **About SWS Dashboard**







#### **SWS Management**



#### File Edit View Insert Reports Rules Mode Context Help 🖻 🖬 8 12 ? 1 🍇 Site activity 🚺 SR 🌉 SWS Usage × × × Non SPW SPW Non SPW SPW 1:00 Total Total 2:00 3:00 24:00 23:00 4,000 1,400 50 Site Activity 2,294 1,317 3,611 40 SR access 911 348 1,259 4:00 22:00 3,500 1,200 SR 931 356 1,287 30 21:00 5:00 3,000 20 538 287 825 Login 1,000 SR Activity 2 6:00 N/A 2 20:00 10 2,500 Surveys 367 N/A 367 0-19:00 7:00 800 2,000 SR Client Link 3 N/A 3 Download 273 135 408 18:00 8:00 600 Call 88 11 99 - 1,500 17:00 9.00 SR Emailed 4 5 0.00 1 400 16:00 Email 8 8 16 1,000 1:00 15:00 FAQ 6 5 11 200 500 18 SR Printed 13 5 224 N/A 224 Maintenance Non SPW Successful Logins SPW Successful logins in the 🚺 Total folders accessed 🌉 Files Non SPW × × 2,000 Total accessed folders 1,980 Reference Library\Customer freeware & shareware\Lee Merrick & Associates Limite 1 1,000 Folders accessed by Non SPW 1,182 Folders accessed by SPW only 798 0 Reference Library/Development Technology/Classic Speedware/Technical Articles/t 🚺 Count of surveys × 🚺 SR activity × 🙋 Folders accessed by Non SPW × 5 Avg Search time Download Center/Production releases 192 🔺 Count of Survey submitted N/A Download Center 81 Avg Search Results 42 Download Center/Production/Media/Windows 75 # of SR Searches 808 49 Download Center/Production/Media Count of Surveys sent 95 # of SR's Viewed 582 42 🗸 Download Center/Production/Esperant/Windows Number of file downloaded 🚺 Overall Site activit: A FAQ × × × Non SPW SPW Total 250 n 50 100 150 200 300 350 400 450 5 8,000 7,205 4GL FAQ 4 5 - 5 1 7,000 4 408 6,000 ATB FAQ 1 N/A 1 4 4,744 з 5.000 273 MED FAQ 1 2 з 3 4,000 2 3,000 2,461 135 2 ESP FAQ N/A 1 1 2,000 1 1,000 VSFAQ N/A 1 1 Total files downloaded Files Non SPVV Files SPW only n n

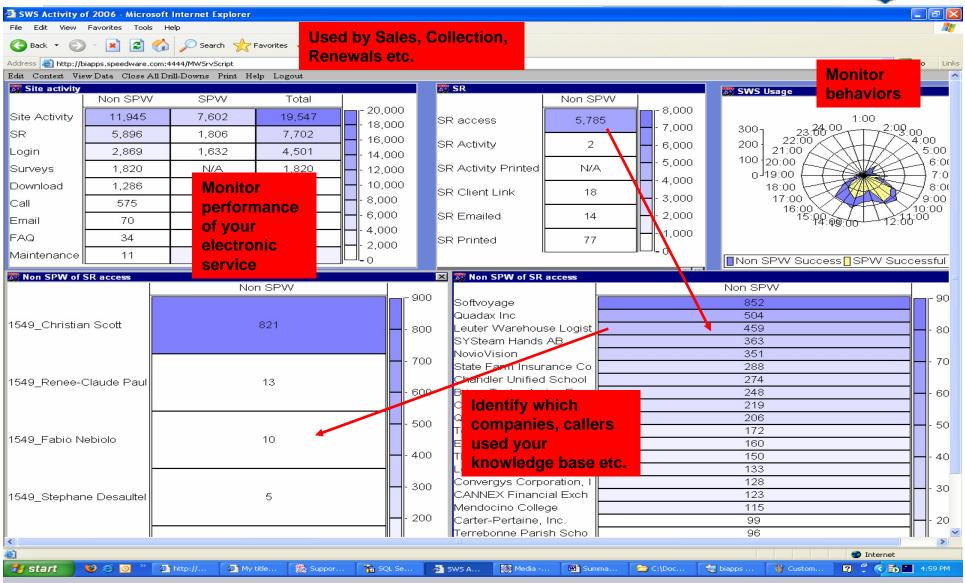


October 2006

🌉 SWS Activity of Mar

#### **SWS Management**







## Activity in Real Time...



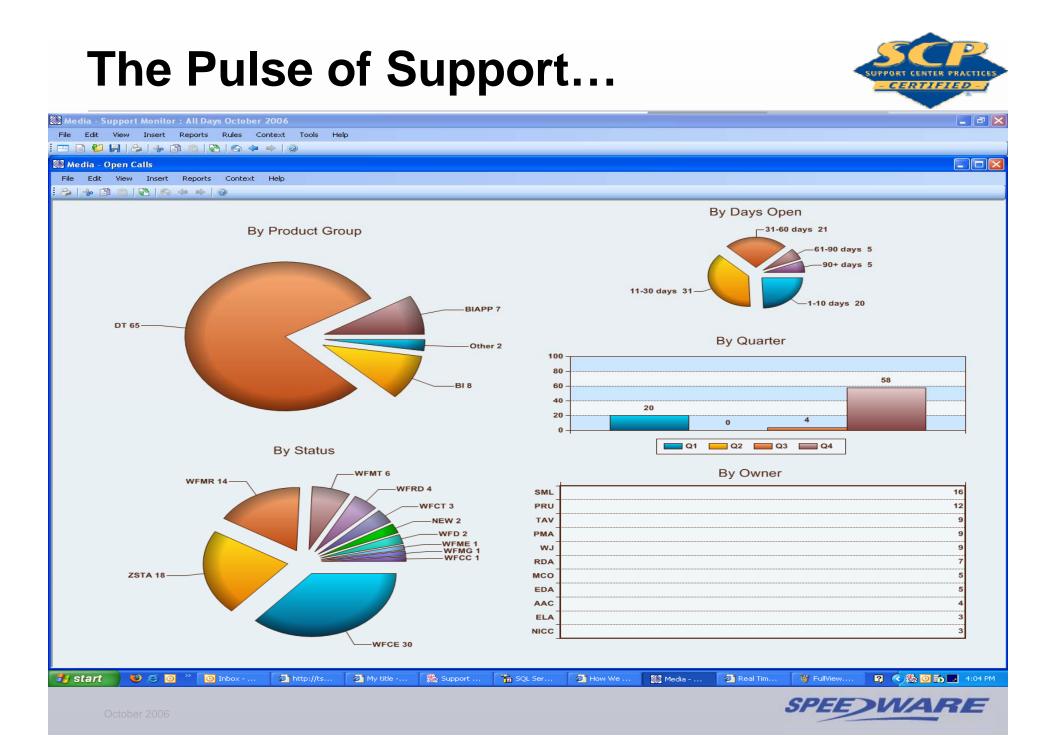
solutions

software

enterprise

		enterprise	Soltware
↓ • → • ③ ⓓ 📾 ॐ 🎒			) (1) (1) (1) (1) (1) (1) (1) (1
See Yesterday			Stats for: 2003/09/22 at 13:35:37
	Today's Ca	1	
Murr Chiller &	D	Phone: 0        Email 2        Web: 0        Other: 0	
<u>New Calls: 5</u>	B	Phone: 1 Email 0 Web: 1 Other: 1	
New Occurences: 20	D	<u>Phone:</u> 1 <u>Email 4</u> <u>Web:</u> 0 <u>Other:</u> 12	
The Occurrences, 20	B	Phone: <u>1</u> Email: <u>1</u> Web: 0 Other: <u>1</u>	
Calls Closed: 3		<u>T: 0</u>	
<u></u>	B	<u>L 3</u>	
<u>Open Calls: 91</u>		<u>T. 74</u> <u>I 17</u>	
	Today's SW	/S Stats	
	Visitors	Currently Logged in Visitors	
Logins: 15	101 Andrew Bocchicchio	101 Andrew Bocchicchio	
<u>SR Searches: 5</u>	101 Andrew Bocchicchio 101 Andrew Bocchicchio 3634 Darren Scott	101 Silvia De Ciccio 1748 Dale Parker 101 Andrew Bocchicchio	
<u>SRs Viewed: 8</u>	1702 Mario Castro Dominguez		
<u>Linked SRs: 0</u>	<u>101 Silvia De Ciccio</u> <u>304978 Matt Clarke</u> 304978 Matt Clarke		
<u>Calls Entered:</u> 1	6811 Bobby Napier 3634 Gareth Edwynn		
<u>Calls Viewed:</u> 1	1340 Francoise Rousseau 8554 Becky McDorman		
<u>Downloads:</u> 2	101 Peter Papaionnou 1748 Dale Parker		
Potentially Saved Calls: 16	101 Andrew Bocchicchio		
<u>Potentially Saved Callbacks:</u> <u>1</u>			
<u>New Call Deflection</u> : 84%			
<u>New Callback Deflection</u> : 13%			
<u>Total New Deflection</u> : 63%			



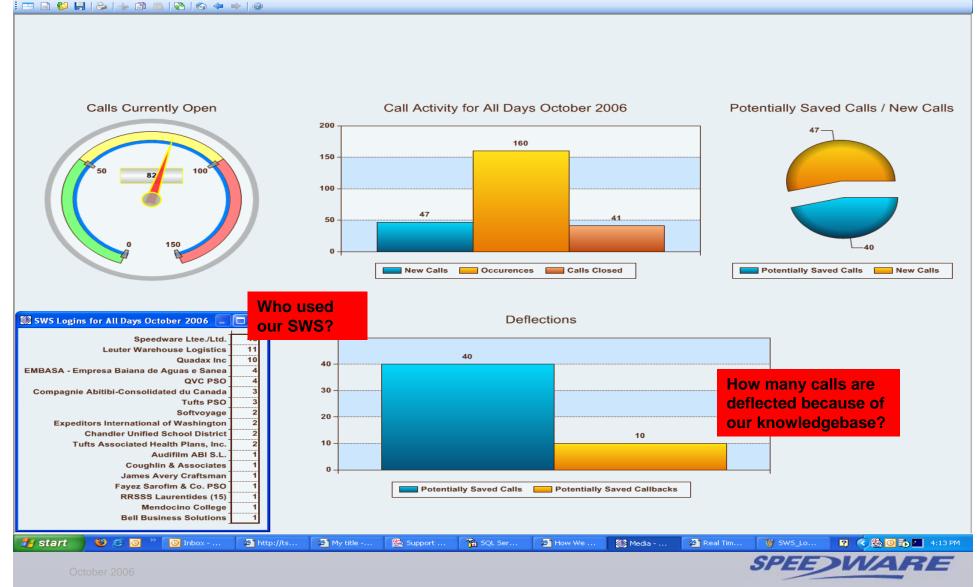


#### The Pulse of Support...



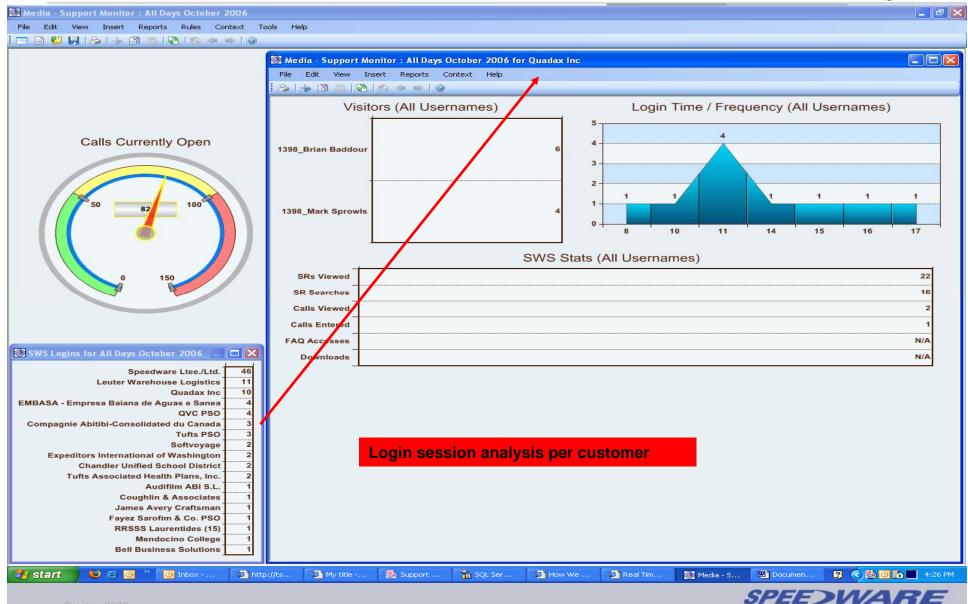
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Media - Support Monitor : All Days October 2006 File Edit View Insert Reports Rules Context Tools Help



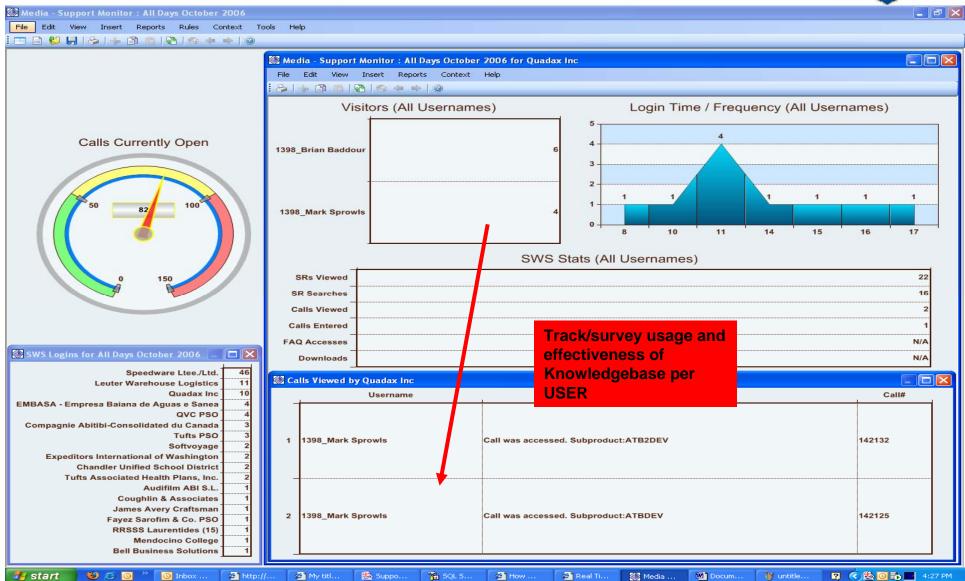
#### The Pulse of Support...





## The Pulse of Support...







# What's On Your Dashboard? ...



solutions

software

enterprise

- Manage by the numbers
  - Make IT your friend (Access to data is crucial)
- Get into the issues
  - You represent the voice of the customer... Make your opinion count
- Don't wait for the perfect solution just start, start small...
- Be prepared to act (Question process / Improve)
- Expose your support / service "business"
- Raise strategic value
- Manage expectations
- Realize that your dashboard is never finished...







enterprise

S

software

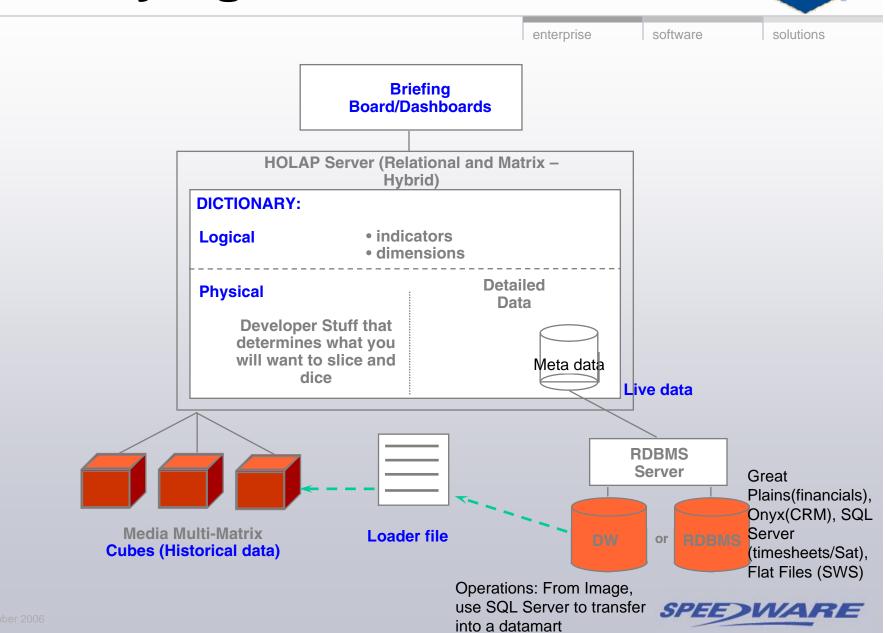
solutions

#### Thank YOU!

#### Maria Anzini@activant.com



# **Underlying Structure**



CERTIFIED