

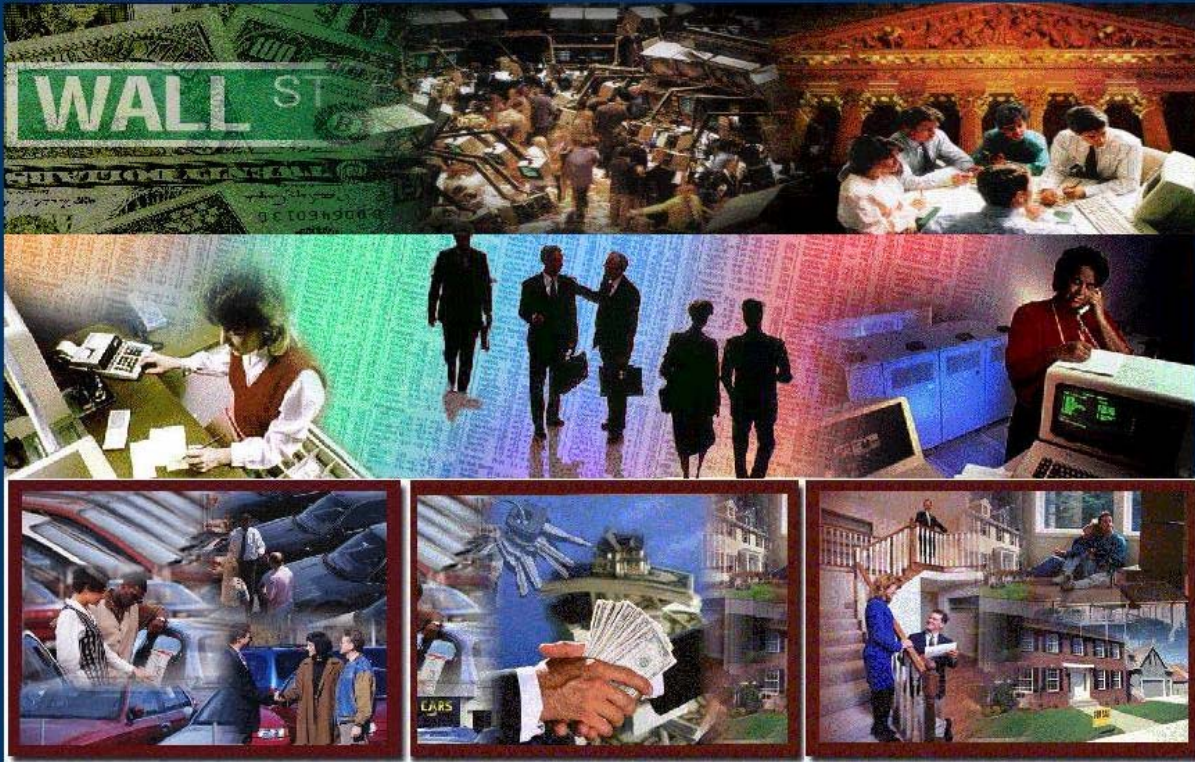
# TARIVA

*Connecting Processes and Relationships*

## Internet-based Customer Relationship Management *iCRM*®

*... hassle-free, anywhere, anytime. ...*

### Tariva



**Connecting Processes and Relationships**

# Introduction

Tariva offers state-of-the-art solutions to enhance customer relationship management (CRM). Information Technology is rapidly changing the way we do business, now and well into the future. Clients no longer expect to be treated as part of a mass market. Business clients of the new century, from consumer goods to industrial products, to all services, will demand products and services that meet their own unique requirements, delivered when they want and where they want. More and more businesses and consumers are demanding these unique products and services, but do not want to pay any more than what they pay for the "mass-marketed" products and services. Information technologies allow the vendors to satisfy these demands more readily...and just in time. For example, one-to-one marketing, interactive selling, web-based selling and buying are made possible because of technology. This technology pace will continue as the true global markets emerge, and inter-relationships between customers and vendors expand.

The performance of the bottom line of any type company is directly related to how well

information technology is used to enhance CRM. It is costly to acquire a new customer... it is a constant business challenge to service and retain an existing customer due to the increasing number of alternate options available... and, it is key to a successful company to grow the existing customers by selling more products and services, and building on the relationship.

Regardless of:

- Whether it is a manufacturing company, a financial services institute, a Health Care provider, or a Government agency
- Whether the customer is a business, a patient in a hospital, an investor or a consumer
- uses direct marketing, direct selling, indirect selling using business partners such as OEM, VARs, distributors, or uses a Web-based marketing and selling system...

under any of these situations, information technology is a MUST to survive in the remainder of this century, and to grow and prosper in the next one.

## **iCRM® Offers:**

**Sales, Marketing, & Customer Support Service Solutions that increase profits through:**

- ❑ **Business Process Implementation**
- ❑ **Closed-loop, Integrated Selling & Servicing**
- ❑ **Increased Customer Loyalty**

**Solutions to address the needs of *all* the customer touch points in an organization including:**

- **Field & Inside Sales**
- **Marketing Analysts & Managers**
- **Telemarketing & Telesales**
- **Customer Service Reps**
- **Distributors, VARs, OEM**
- **Finance**
- **Management**

**State-of-the-art Technologies:**

- ❑ **Native Web-based**
- ❑ **Multi-tier, open architecture**
- ❑ **Java, HTML, SQL Databases**
- ❑ **Any Windows platform: NT, 2000, XP, 98/95**
- ❑ **Linux server**
- ❑ **Thin client**

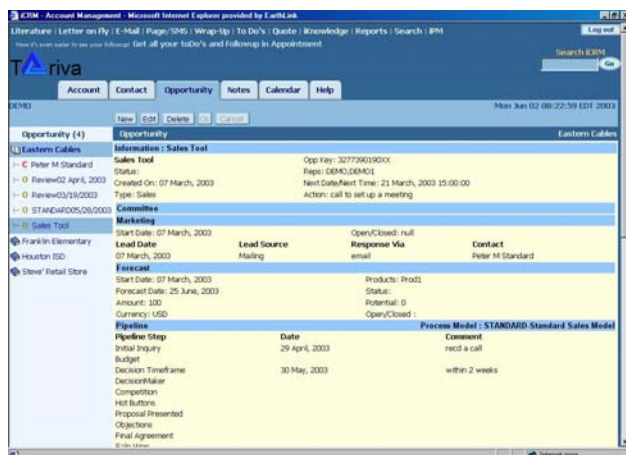
# iCRM® Capability

## Overview

iCRM is a Customer Relationship Management (CRM) application suite for all sizes and types of companies. It provides an environment and tools to create and evolve a customer-focused database. The applications support integrated processes that allow customer-oriented organizations to retain and grow their customer base.

## Information Rich Database

The user can establish a single database or multiple databases depending on the fragmentation of the corporation's product lines or businesses. The information accumulated in the database includes a complete description of each account, their relationships, opportunities at the account and all activity that has transpired or is in process. The user can include any information or planning that is considered relevant to their own or other's functional roles. New account leads, campaigns, and other important entities are organized and managed.



Accounts can be linked according to a hierarchy. Multiple opportunities and contacts can be linked to an account. Pipelines (sales models) and To Do's (actions) can be linked to opportunities. Actions can be assigned to individuals. Tables that describe all fields, field

definitions, screen buttons, and labels are user-definable and maintained in the database. There is extensive freedom to construct a working database.

## Client-Focused Processes

All customer-focused organizations, including sales, marketing, customer service, and senior management will benefit from the integration and automation of all the customer-focused processes. iCRM supports direct contact and telephone-based activities for in-house and field sales agents. Account management, opportunity management, contact management, and forecasting are key processes integrated under iCRM. Lead tracking, database marketing, quoting and literature fulfillment are only a few of the additional application modules that are integrated under iCRM.



ipModeler™ is a unique product that offers a full implementation of a business process within a company. Through the use of such a tool, an organization is now able to seamlessly link multiple people and functions into a well-defined business process, thus, increasing effectiveness and responsiveness.

## Job Related Processes

While *iCRM* focuses on customer retention and growth, it provides many tools that help automate the functions that each sales, marketing and support person must perform while doing his or her job. Expense report management, goal/compensation planning, competitive analysis, multi-product management, literature fulfillment, batch letter management, forecasting, pricing strategy, trend analysis, and quoting are only a sample of the supporting processes available to you. The extensive job-related aides offered by *iCRM* enables more focus on the customer and business growth.

## Teamwork

The flexibility of *iCRM* allows controlled access by, and association with external entities that play key roles in opportunities, partnerships and dealerships, and OEM transactions. *iCRM*'s open architecture supports multiple views, styles, and languages. Without undermining the sales person's control over his or her customer opportunities, *iCRM* integrates the efforts of all organizations into cohesive projects that address both customer retention and acquisition.



## Technology

*iCRM* has as its foundation a three tier architecture: thin client layer, modular application and agent layer, and a relational database layer. This is fundamental to the product's flexibility. Java objects and a browser platform at the client layer provide for local or remote users, and hardware independence for the user's workstation. Object oriented design at the server layer provides for extensibility of functions, and portability across different hardware platforms. An ANSI standard SQL interface allows for accommodation of contemporary relational databases (Oracle, Sybase, Informix, SQL Server, etc.).

With Fusion as the Object Oriented Analysis and Design methodology, *iCRM* is created under stringent processes that strengthens the quality of the product. It also ensures detailed documentation that allows ease of knowledge transfer, and avoidance of errors when extending functionality. A full set of documentation, tools, and training aides facilitates integration of *iCRM* into enterprise information systems, customization to user requirements, and user training.



# Typical iCRM Users

## Sales – Inside and Field

Tariva's *iCRM* solutions provides a range of functionalities which address the needs of sales staff, both in the field and in the home office.

- Account Management
- Opportunity Management
- Expense Reporting
- Product/Service Prices
- Product/Service Configurator
- Competitive Information
- Marketing Encyclopedia
- Proposal Generation
- Data Synchronization
- Goal/Compensation Planning
- To Do's
- Tickle File Management
- Call Sheet
- Lead Entry And Tracking
- Autodial

- Contact Management
- Pipeline Management
- Forecasting
- Multi-Product Management
- Notes Management
- Literature Fulfillment
- Duplicate Record Management
- Account/Opportunity/Contact Query
- Standard Report Generation
- Screen Design & Layout Management
- Assistants
- Batch Letter Management
- Letter on the Fly
- Team Selling
- Inbound/Outbound Calling

## Telemarketing

As a part of a campaign management cycle, marketing programs require a follow-on process, for example, telemarketing. Telemarketing staff productivity and lead qualifications are major concerns. *iCRM* provides functionality's to address these concerns.

- Contact Management
- Account Management
- Opportunity Management
- Suspect & Prospect Management
- Pipeline Management
- Autodial
- To Do's
- Notes Management
- Literature Fulfillment
- Team Selling

- Inbound/Outbound Calling
- Lead Entry
- Tickle File Management
- Multi-Product Management
- Batch Letter Management
- Letter on the Fly
- Duplicate Record Management
- Account/Opportunity/Contact Query
- Screen Design & Layout Management
- Assistants

## Sales Management

In a complex world of sales, sales' management challenges are to ensure highest sales productivity as well as customer satisfaction and loyalty. Information technology is critical to sales managers by providing them with tools to know the latest status of a sales campaign to territory assignment and forecast management. *iCRM* has features to make sales management tasks more easy and timely:

- Forecasting and Forecast Management
- Expense Management
- Territory Assignments
- Accounts Management
- Opportunity Management
- Multi-Product Management
- Proposal Management

- Pipeline Management
- Analysis
- Pricing Strategy
- Account/Opportunity/ Contact Query
- Standard Report Generation
- Assistants

## Marketing Staff and Management

Marketing is one of the most important functions in a company for charting out the course of business expansion, introducing new products, and developing a detailed strategy to position a company in an increasingly global marketplace. But, the marketing department needs tools and timely information to perform such functions. iCRM has the way to bring appropriate technologies to marketing:

### Marketing Analyst

Prospects/Mailing  
Database Segmentation  
Leads Management  
Campaign Management  
Market Analysis  
Competitor's Data  
Product Configuration  
Trend Analysis  
Gap Analysis  
Marketing Encyclopedia  
Customer Surveying and Analysis  
Complaint Analysis  
Account/Opportunity/ Contact Query  
Notes Management  
Screen Design & Layout Management

### Marketing Manager

Market Analysis  
Campaign Analysis  
Leads Management  
Pipeline Management  
Promotional Schemes  
Technology Needs  
Customer Surveying  
Pricing Strategy  
Account/Opportunity/Contact Query  
To Do's  
Standard Report Generation  
Screen Design & Layout Management  
Assistants

## Customer Service Management

It is not enough to simply sell a quality product, anymore. In today's world, a company's image is usually determined by its ability to support its products and services. Customer Satisfaction is maintained by the Service organization and systems that contain up-to-date information about all of the current and historical activities transacted between the Customer and your company. This can range from contractual relationships to open sales orders or open service calls. iCRM has the ability to make all of this information available to the Service system of your choice, and therefore, allowing the Service agents to resolve most Customer issues with just one call.

Call Center Management  
Call Tracking & Follow-up  
Help Desk Services  
Network Management  
Contract Management  
Spare Parts Sales and Tracking

Change Management  
Asset Management  
Decision Support  
Satisfaction Surveying  
Training Scheduling  
Customer Self Service

Other iCRM users include:

Finance (for receivable, contracts invoicing, etc.)  
Program Managers for custom product/service management  
Partners (Resellers, Distributors, etc.)

iCRM includes several critical modules to assist in the full life cycle customer management. A brief description of these modules is included below. For more information on these modules, please contact [info@Tariva.com](mailto:info@Tariva.com).

### Intelligent Process Modeler (ipModeler™)

ipModeler™ is a closed loop business process and work flow system intended to allow a user to define the stages necessary to accomplish many of the tasks involved in acquiring, retaining and growing a customer. It is an integral part of Tariva's iCRM product. Tariva's ipModeler provides users with the most critical component of a CRM solution : the ability to control and automate the sophisticated back-end business processes that drive the applications themselves. To perform CRM tasks correctly, you need a solid process management, and the ability to integrate multiple systems and multiple users and departments across the organization into that process.

ipModeler contains an editor that is easy to use to define different business processes related to each opportunity/transaction. Many different business processes can be managed using ipModeler, such as RFQ processing, proposal preparation, service/support management, and many more.

### iQuote™ - Quote Module

The iCRM Quote Module gives iCRM users a quick and easy way to generate quotes for both customers and prospects. The Quote Module utilizes the Account and Contact information from within the iCRM database to minimize data entry and eliminate typographical errors. Once created, the quote may be printed, faxed, or emailed. all from the iCRM application. This means that you can turn around your quotes to customers and prospects very quickly, without added administrative time and redundant data entry.

### iKnowledge™ – Knowledge Center System

An effective customer relationship management (CRM) system requires a central repository of information that will be shared by multiple people in an organization, including customers. Tariva's iKnowledge is such a repository of valuable information on customers, products & services, markets, competition, company business data, etc. It is a free-standing system, available as a module to iCRM™ as well as it can be easily integrated with any CRM product. These documents may be customer proposals, contracts, RFQ's, project plans, etc. iKnowledge supports documents prepared with standard office and desk top applications such as Word, Spreadsheet, Presentation, Graphics, Project, HTML, etc.

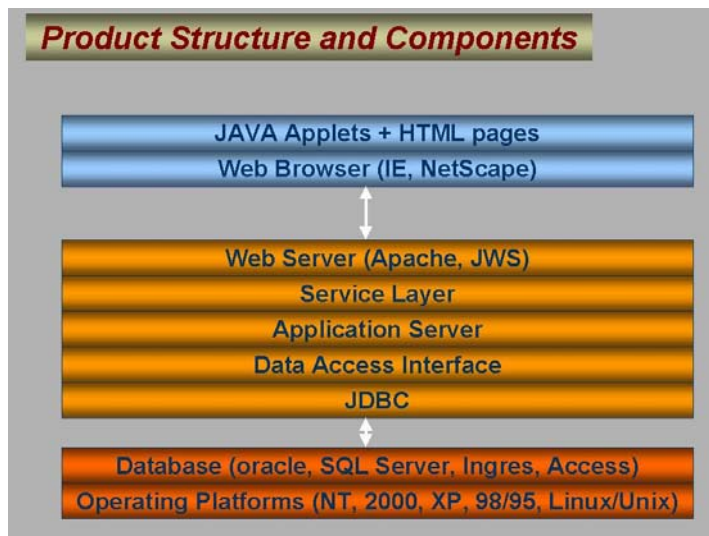
Attached documents are saved on the web server. Alternatively document on local computer may also be attached but those will be available to any other user for download/view only if the computer is on the network.

### Automove™

Automove is a data synchronization module which allows some of the users to work with iCRM without being always connected to the Internet. In such cases the users have their own application and database on their laptops/notebooks/desk tops. When they are connected to the Internet, Automove synchronizes the data in both directions

## [iCRM Architecture](#)

Tariva's *iCRM* is designed with a multi-tier architecture implemented using the Internet and object technologies. Basically, the User Interfaces (Browsers and Windows), Applications (i.e. Objects/Applets) and Databases (RDBMS and Distributed) are provided in three separate tiers. The client can be a Thin or a Full client. A Thin Client has specific user interfaces (based on its needs). Full client includes certain application objects. These objects can be "loaded" from the server as required.



*iCRM*'s 3-tier architecture has a number of benefits:

**Performance/Scalability:** In contrast to 2-tier where the application code is a part of the client, in 3-tier, the client is made thinner with only the user interface code. If properly designed, this drastically reduces the interactions between the client and the application server, which results not only in higher performance, but also scalability in terms of number of users.

**Complexity:** 2-tier is very well suited for small applications where Visual Basic and

SQL server would be enough to handle the complexity. To handle large applications like world-wide marketing, we must go with the multi-layered approach.

**Supportability:** The support/maintenance of an application is made more simplistic with 3-tier architecture. Enhancements or modifications can be made to one layer without disturbing the other layers. This makes the whole application easily supportable, consuming less time and resources.

The blending of Object-Oriented technology with 3-tier technology provides the following additional features to the *iCRM* project:

**Upgradability:** The latest trends and changes in the technology, as well as the industry, can be easily adopted compared to a 2-tier RAD (Rapid Application Development) approach.

**Flexibility:** Similar to the preceding feature, the application will be flexible for all future changes and enhancements.