

Wintouch CRM

*the ideal CRM solution for organizations
running their main enterprise applications on
the IBM System i platform*

Why do you need CRM?

So...what is CRM and why is it so important to your bottom line? Customer Relationship Management is more than just a software solution; it is a corporate strategy that focuses on building strong relationships with customers from the very beginning when you first acquire them as leads. CRM provides each employee with a 360-degree view of the customer. By maintaining sales, marketing, customer service, and accounting information in one application, you will ensure that your customers are receiving the highest quality of care.

CRM not only provides information critical to giving your customers the highest quality of service, it also provides the tools to ensure that you are delivering the highest quality product. As you use CRM to track your interactions with your customers, patterns will start to emerge giving you critical information. When an item is returned it's important to know whether the customer regularly returns items and why. And, if a particular product gets returned on a consistent basis, maybe you need to refer the issue to your Quality Assurance department.

CRM business analytics will also enable you to pinpoint where your current business processes are achieving success and where things are falling through the cracks. Monitor the sales process to make sure opportunities are progressing towards closed sales, and that none fall off the radar. Diagnose the reasons customers stay loyal to you or go elsewhere to maximize customer retention. Acquiring new customers and retaining the ones you have is what CRM is designed to help you do better!

The Value of a Customer

The key to success in any business endeavor is knowing your customer. If you don't keep your customer happy they will take their business elsewhere. That's a given. But, it is not enough to know what your customers want and need. You also need to know the value of your customers.

To determine the value of a customer to your business, you must get a complete picture of what they cost you and what value they bring. Which customers pay on time? Which don't pay? Which customers refer new business to you? Which customers return a lot of the products they buy? Which customers burden your customer service department with constant calls? The answers to these questions are critical to determining which customer relationships you want to spend the most time developing.

Not only do you need to know the current value of your customers, you also need information that will help you to turn bad customers into good ones. If you see that a customer is regularly overburdening your call center by placing multiple orders in a single day or week that could easily be consolidated into one order, you can target them using CRM and offer them an incentive if they place only one order per day/week or if they don't place any orders below a certain dollar amount. Successfully increasing the value of your existing customers is critical to improving your bottom line.

Why run your CRM on IBM System i?

When looking for the right CRM application for your organization, it is critical that you consider the many benefits of consolidating your applications on one platform. All too often, CRM projects fail because integration to main enterprise applications never happens and CRM becomes yet another island of disparate information that provides no value to its users. Avoid this potential sand trap by choosing to implement a CRM solution that runs on the same platform as your main enterprise applications.

If you are currently running your main enterprise applications on the IBM System i platform, implementing a CRM application on the same platform is ideal for a number of reasons:

- **Save money on integration and implementation costs**, not just on the solution itself, but on employee hours and systems costs. Utilize your existing hardware and IT personnel when you install a native System i (iSeries, AS/400) solution.
- **Integration to mainline applications.** Integration to existing systems that contain the data that sales and customer service need is critical to CRM success. The ROI of CRM involves making use of information you have already gathered about your customers.

- **The System i has the lowest TCO.** The IBM System i platform has the lowest TCO of any leading midrange server. According to an IDC study, on an annual cost-per-user basis, the System i is 63% more cost effective than Windows NT and 42% more cost effective than UNIX.
- **The System i has the fewest unplanned outages.** Server downtime is costly and frustrating. A Gartner study found that Windows NT users see an average of 224.5 hours of unplanned outages per year, per server. On the basis of 2,080 work hours per year, that equals an unplanned outage rate of 10.8%. By comparison, the iSeries is 43 times more reliable, with only 5.2 hours of unplanned outages per year.

Why Wintouch CRM?

Wintouch CRM is **the** System i-native CRM. This means that you get both customer-facing functionality and access to real time enterprise data in one easy-to-use application. And, Wintouch provides tight integration to your enterprise applications in a fraction of the time and at a fraction of the cost of a non-native solution. Customer-facing employees have historically had both limited access to enterprise data and to the history of interactions their customer-facing coworkers have had with customers. This has led to countless inefficiencies and frustrations. Wintouch CRM puts the power into the hands of your customer-facing employees to do their jobs better.

The screenshot displays the Wintouch CRM application window. The main window title is "General Dynamics - 100001". The interface is divided into several sections:

- Account Summary:** A form displaying account details for General Dynamics. Fields include Account Name, Address Line, City, State/Province, Zip/Postal, Main Phone, Web Site, Salutation, First Name, Job Title, Contact Phone, E-Mail, Personal Em, Mobile Phone, Account Type (Customer), Line-2, Line-3, Country (USA), Region (Eastern), Last Payment (02/28/2006), Credit Status (Credit Ok), Aging Status (Current), Acceptable (NET 30 Days), Credit Limit (\$2,000), Current YTD (\$12,000.00), Current MTD (\$240.00), Prior MTD (\$250.00), Prior YTD (\$9,600.00), MTD Items (25), YTD Items (650), and Primary Salesperson (Smith, John).
- Account Note:** A text area containing the note "they do 100m,".
- Bar Chart:** A small bar chart at the bottom right comparing Current YTD Sales and Prior YTD Sales. The Current YTD Sales bar is significantly higher than the Prior YTD Sales bar.
- Activities Table:** A table at the bottom showing recent activities.

Activities	Date	Time	Contact	Type	User	Dura...	Requiring
Next Act:	02/27/2008		John Parpala	Call-Out	J.Phetan	0:0:0	Sales-Order- -Medium-
Last Act:	03/19/2008	11:38 AM	John Parpala	Call-In	J.Smith	0:5:6	Customer Service-Incident or Problem...

The interface includes a menu bar (Account, Contact, Activity, Options, Reports, Administration, Window, Help) and a toolbar with various icons. The status bar at the bottom shows "NUM | CAPS | INS | 8:31 AM".

Ask for a full-size screen image as a jpg. The goldenrod fields represent real-time data from the ERP running on the System i server. The account details are shown in green and contact info is in blue. The bar chart at the lower right is part of the Wintouch Dashboard with YTD sales

Wintouch puts the power of real time enterprise data in the hands of your end-users

Simplify & modernize access to legacy applications with Wintouch CRM. Your enterprise applications on the System i contain valuable information that your employees need to do their jobs, but how easy is it for them to access that information? Often legacy applications are complex and end-users must go to a power user or someone in the IT department to get the information they need. With Wintouch you put the power of real time information in the hands of users. Wintouch's intuitive graphical interface makes it possible for end-users to run their own queries and reports.

In addition to its rich CRM functionality, Wintouch gives users instant access to business critical System i information such as accounting, sales history down to the line item, production, inventory, shipping, and more, because of its ability to tightly integrate with these applications. As soon as an order is placed in your order entry application on the System i, a copy of it will be available for display and analysis with business intelligence tools. At the end of each business day, all of the days invoices will be tabulated to provide accurate YTD and MTD sales figures in Wintouch...just to name a few!

Wintouch CRM provides one-stop access to both System i and desktop applications

Wintouch CRM bridges the gap between System i applications, desktop applications, and the internet. In too many organizations specialty applications without integration to one another have created data silos. The data cannot travel from one application to the other so the right hand does not know what the left hand is doing. Maybe your IT department has to manually move data from one application to another or your end-users have to toggle between applications or ask a power user to obtain information for them from complex back-end applications. The best way to manage your human resources is to keep everyone's focus on their core duties. With Wintouch's simple and modern interface, and wealth of back-end information, it will help everyone stay focused on what they do best.

- **Integration to MS Outlook, IBM Lotus Notes, and Mozilla Thunderbird** means no more cutting and pasting to store emails. Outgoing emails will be automatically stored and incoming emails can be saved with a single click
- **Package Tracking and other Dynamic URLs** make it possible to track shipments sent by various carriers with the click of an icon
- **Access the "Green Screens" you use most frequently with the click of an icon** from within Wintouch
- **Business Intelligence tools** enable end-users to run their own reports on both enterprise and CRM data with a single click
- **Microsoft Excel Integration** allows you to export reports and put them in presentation format
- **Microsoft Office Integration** allows you to use templates to send single letters or mass mailings using mail merge

System Requirements for Wintouch CRM

Client

- Windows XP or Vista or Mac OS X Leopard with 64-bit Intel processor
- Netscape 8.x or later, Internet Explorer 6.x or later, Mozilla Firefox 1.5 or later, or Safari 2.0 or later
- Java 6

Server

- IBM System i (iSeries or AS/400)
- i5/OS (OS/400) V4R4 or later
- Configured TCP/IP
- Active Telnet server (for installation and maintenance)

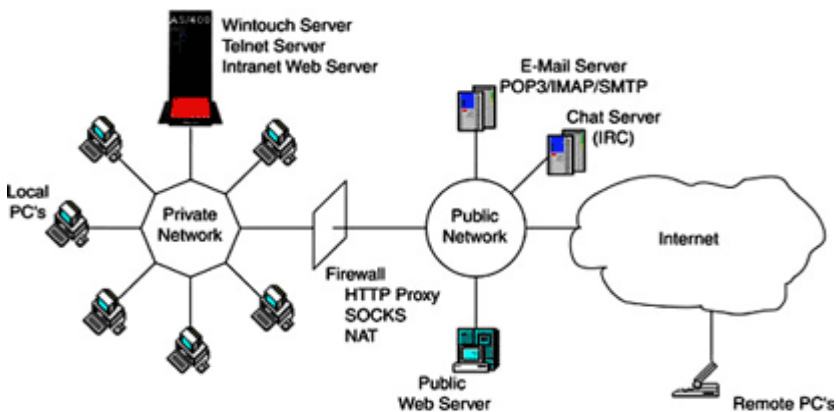
LAN

- Ethernet
- Token-Ring

Web Server

- IBM System i (iSeries, AS/400)
- Microsoft IIS
- Apache
- Any HTTP Web server
- Optional: IBM Websphere Application Server Express v7.0 for Wintouch Mobile for handheld devices and Wintouch Web Forms

Typical Wintouch Configuration



Wintouch Library resides on DB/2

The Wintouch library is a separate library residing on DB/2. The data is replicated from your customer master. Trigger programs and APIs written in RPG synchronize data between Wintouch and your other System i applications. That means that users get seamless, real-time, access to enterprise data in Wintouch's user-friendly graphical interface.

Customer databases from existing contact management systems can be converted as part of your Wintouch CRM installation.

Contact information stored by users in spreadsheets can be imported directly into Wintouch. Wintouch's Import Data Tool makes importing files from spreadsheets a breeze, with intuitive graphical design and mapping.

Wintouch System Usage Statistics

The Wintouch library requires only a minimal investment in system resources. Most of our customers are running at about 40 - 60% utilization on their System i box. After one year of Wintouch usage, the change is only ~1%, thus if the customer was at 40% utilization, after one year, utilization would have increased to ~41%. We have never had a customer have to purchase more disk space or memory.

Usage data from existing Wintouch customer environments:

Accounts: 27,605
Contacts: 58,267
Approx. 14 years of usage
Current library size: 634MB

Accounts: 1,977
Contacts: 166,178
Approx. 5 years of usage
Current library size: 585MB

Accounts: 753,934
Contacts: 857,317
Approx. 4 years of usage
Current library size: 4.2GB

Wintouch CRM Features & Capabilities

➤ Setup & Customization

- Tight integration to System i-based business applications
- Customer-specific product configuration, contracts, profile, and service history all captured in one place
- Ability to restrict access to CRM data by user, department, territory, etc.
- Ability to customize windows by user-type and/or account type
- User-defined windows and fields
- Customize field/window names to reflect internal terminology and business practices
- Import Data - with easy mapping
- Web Forms to submit data via your company's website
- Support for multiple languages
- Support for multiple currencies

➤ Solution Depth & Deployment Options

- Wintouch Lite - offline version...reps in the field can download history on the accounts they will be visiting, record their activities, then synchronize when they reconnect to the internet.
- No hidden costs - not a modular product & all integration costs are included in the quote up front
- Client licenses on a concurrent user basis, i.e. you only need licenses for the maximum number of users that will be logged in at any given time
- Integration to MS Outlook, Lotus Notes, and Mozilla Thunderbird email clients
- Integration to MS Excel and Word
- One-click access to the green screens you use most often

➤ Support & Help

- Help Buttons on each window with link to contextual help page
- Help by Topic - searchable knowledge base
- On-site Training Program
- Web-based continued training
- Go-Live Plan

➤ User Interface

- Click "Next" to page through search result or report result records
- Build lists of records on the fly
- Customize user interface font, color, look & feel by user/admin
- Customize toolbars by user, department or company-wide, including icons giving one-click access to custom reports, green screen, web sites, and desktop applications
- One-click access to contextual features throughout application
- Ability to print window displays
- Global Search Feature
- Searchable Notes
- Double-Click on any Activity, Report, Account/Contact Listing to open the record
- Multiple Accounts can be displayed in a Tile or Cascade arrangement

➤ Activity Management

- Activity Log, displaying all of the activities of an account on a single, filterable screen
- Activities can be tied to an Account or Contact, or to a particular lead, quote, order, warranty claim, customer service incident, etc.
- Default Activity field values by set according to user, department, and/or class of activity
- Work flow to schedule activities that occur in a predefined sequence
- Customize the fields in activity screens
- Use Reporting to track activities scheduled and completed activities - by department, user, activity type, etc.
- Store Documents at the activity level, which can then be opened, printed, or emailed
- Printable Daily, Weekly, and Monthly Calendar views

- Ability to merge customer data with company document templates for custom proposals, letters, quotes, and contracts, and have the application automatically send the document and store it in the Activity Notes
- Track quotas around cold calls, numbers of appointments scheduled, and lead conversion targets
- Ability for system to automatically send emails to contacts in response to a work flow trigger event, automating follow-up
- Emails sent using MS Outlook, Lotus Notes, and Mozilla Thunderbird automatically stored as activities in Wintouch, eliminating need for cut-and-paste
- Incoming emails can be saved in Wintouch with a single click
- Search incoming and outgoing emails by keyword using the Wintouch Searchable Notes feature

➤ **Marketing Capabilities**

- Import large lists of leads into Wintouch, with duplicate check, and automatically schedule/complete an activity that triggers a work flow & automates the lead pursuit process
- Custom marketing fields to enable ease of profiling & creating targeted marketing campaigns
- Send email broadcasts, print mailing labels, and more, using dynamic groups that you define
- Ability to conduct mass email campaigns using HTML templates you create in the Wintouch WYSIWIG HTML Template Builder
- Track the sales made as a result of your marketing campaigns by recording the initial marketing campaign in all follow-up activities
- Use Wintouch reporting to prioritize where to put your resources based on projected close date, potential revenue, sales stage, and close probability
- Generate lists of customer-prospects by products sold to create targeted marketing campaigns of complementary products

➤ **Customer and Contact Management**

- 360-degree view of the customer record, including contacts, leads, sales history down to the line item, customer service incidents, and current opportunities and ALL activities
- Organization Chart - keep a record of company hierarchy so that you understand who the key decision makers are, and who should be your point of contact under different circumstances
- Account Relationship Chart - know how your accounts are related to each other & analyze data at the distributor, customer, and ship-to levels
- Automate Customer Service follow-up using work flow
- Track customer service response times using Wintouch Reporting
- Track customer satisfaction using web forms your customers access on your company website

➤ **Lead Management**

- Schedule automatic follow-ups after brochures or samples are sent out
- Create cold call lists, where caller simply has to make the call, record the response, and hit "Next" to go on to the next lead
- Identify and analyze source of sales leads and opportunities

➤ **Sales Process & Opportunity Management**

- Track different opportunities via different processes depending on opportunity type.
- View deals in the pipeline company-wide, by region or territory, and/or by opportunity type
- Build quotes within Wintouch that can then be printed or emailed to the prospect/customer
- Build in work flow logic that will alert sales reps before a warranty or product rental is going to expire so that they can sell an extension
- Summary of stages of the sales opportunity process with capacity to drill down to the finest level of detail

- Expenses Management – user defined fields record business expenses at the activity level, and a one-click custom report can be exported to MS Excel to track what you need to pay out by individual
- Track call histories and activities of individual sales people or by client/project/deal
- Sales Reps in the field can see relevant accounting and inside sales information before walking in to visit the customer

➤ **Customer Care**

- Ability to assign customer incidents via a queue or to the CSR assigned to the account
- Define support processes and track and analyze resolution and turn around times, and diagnose the places where the process stalls
- Generate multi-level alerts when customer incident is exceeding target turnaround time
- Use web forms to enable customers to report incidents via your company website

➤ **Business Intelligence & Reporting**

- One-click reports that can be added to toolbar by individual user, by department, or company-wide
- Dashboard presentation of reports that can be customized by individual user, by department, or company wide
- Export Reports to MS Excel templates with Macros
- Double-click on any report record to open it
- Customize the printable display of your report using the Wintouch WYSIWIG Template Builder

➤ **Document Management**

- Documents can be stored related to a particular record or at the activity level
- Stored documents can be opened, printed, or emailed

Touchtone Corporation and Customer Service

Touchtone Corporation was founded in 1991 to develop enterprise solutions for the then AS/400. In 1993, Touchtone introduced Wintouch CRM as an RPG product, transforming it to a Java-client in 1996. Today, Touchtone's list of success stories reads like a Who's Who of 2008's most recognized market leaders, including Coca-Cola Enterprises, Disney, Enterprise Rent-A-Car, Mobil Oil, Porsche, Nissan, John Wiley & Sons, Sony, and Toshiba. Over the years, Touchtone has established a strong reputation for delivering powerful, cost-effective software solutions and outstanding customer support.

Here at Touchtone Corporation, we practice what we preach. Our business philosophy is: "Customers always come first...period." As our customer, you will have direct dial access to every Touchtone employee. Each time you contact us, you can expect to receive friendly, prompt and effective action to address your concerns. This customer-centric attitude is seen throughout the Touchtone staff, and we have a very low turn-over rate. Most of our staff has been with us for more than 5 years, some with a tenure of 15 years! What this means to you is that when you call us, the person who assists you will have the knowledge and experience to help you effectively, and you will be talking to the same people every time. The longevity of our staff has enabled us to develop into a strong team. Our customer service department works closely with our development department to successfully and efficiently address your needs.

This teamwork mentality extends beyond our own organization and helps to develop strong partnerships with our customers as well. Customer-driven enhancements are developed to directly address our customers' needs and requests. As you use Wintouch CRM to develop, analyze, and improve your organization's core business practices, when you find additional needs, we will respond with enhancements to Wintouch. Our success, here at Touchtone Corporation, over the past 17 years has been achieved by maintaining excellent communications and strong relationships with our customers.

Touchtone has enjoyed steady annual growth, in part because the company has recognized and adapted quickly to changes in the computer industry. The company is committed to the AS/400 - iSeries - i5/OS - System i and to enriching the feature set of Wintouch CRM and its other software products on the IBM Midrange platform. Products in development will reach into additional markets, utilizing cutting-edge technologies including Java, IBM WebSphere, Eclipse, Rational Developer and other new technologies as they come along.

Touchtone is an IBM Premier Business Partner and is a member of the IBM Tools Network. All Touchtone products are IBM ServerProven Software solutions. In addition, Wintouch CRM is an IBM e-business solution, an IBM Value Add Enhancement solution, and has been certified by IBM as "Ready for WebSphere" software and "Ready for Lotus Workplace" software. Touchtone is a part of IBM's ISV Advantage Initiative to offer open, e-business on demand solutions.

For more information on Wintouch CRM, or to request a demo, please contact us by phone at 800-786-8663 (USA) / 1+714-755-2810 (International), or by email at info@touchtonecorp.com.

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