

Eddie Donovan, Inc.

Enterprise Relationship Management Infrastructure



By Eddie Donovan

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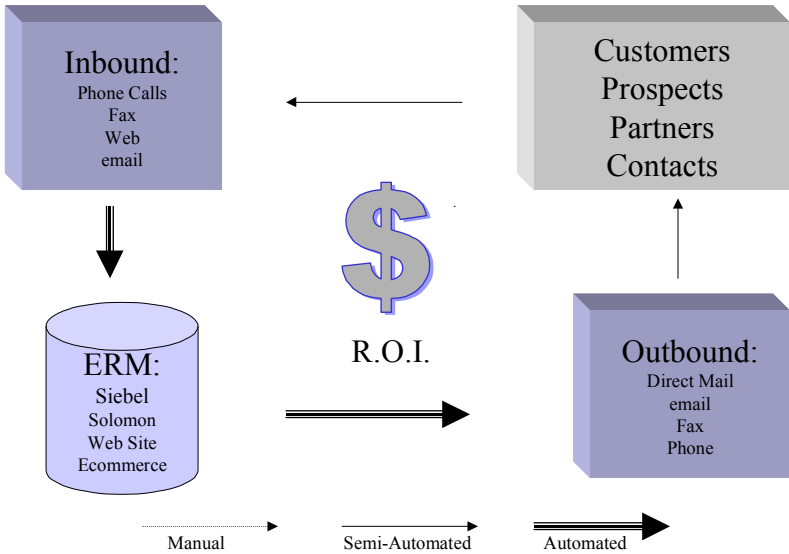
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Executive Summary

The recent launch of our new product™, the departure of key MIS employees, and the increasing rate of web centric technological progress among its competition have prompted Eddie Donovan, Inc. to evaluate its current Enterprise Relationship Management (ERM) infrastructure. Elements of particular concern revolve around the ability to capture, integrate, manage, and utilize prospect/customer data among its network of databases.

An ERM infrastructure is an automated system that tracks prospects from initial inquiry, evaluation, quote, sale, fulfillment, maintenance, post sale revenue, and repeat business processes (**Ex.1. Goal: Automated ERM Infrastructure**). The system must be able to provide customized information quickly and easily for direct marketing campaigns while helping to automate them as much as possible. It must also provide valuable business analysis information such as license revenues from new prospects versus existing customers, percentage of people who evaluate, percentage of people who purchase, promotional results tracking, and sales effectiveness. Information derived from the system would greatly enhance forecast ability and facilitate strategic decision making.

Exhibit 1 - Goal: Automated ERM Infrastructure (Enterprise Relationship Management)



Eddie Donovan, Inc.'s ERM infrastructure must be fully web/Internet centric to accommodate automated electronic commerce, implement automated database driven web applications, and automatically push detailed sales/marketing reports to the corporate Intranet and Extranets.

A successful implementation of the proposed ERM infrastructure would enable Eddie Donovan, Inc. to lower the cost of sales and improve customer service. This will provide the Eddie Donovan, Inc. the ability to conduct dynamic and automated one-on-one marketing with partners, customers, and prospects by enabling Eddie Donovan, Inc. to:

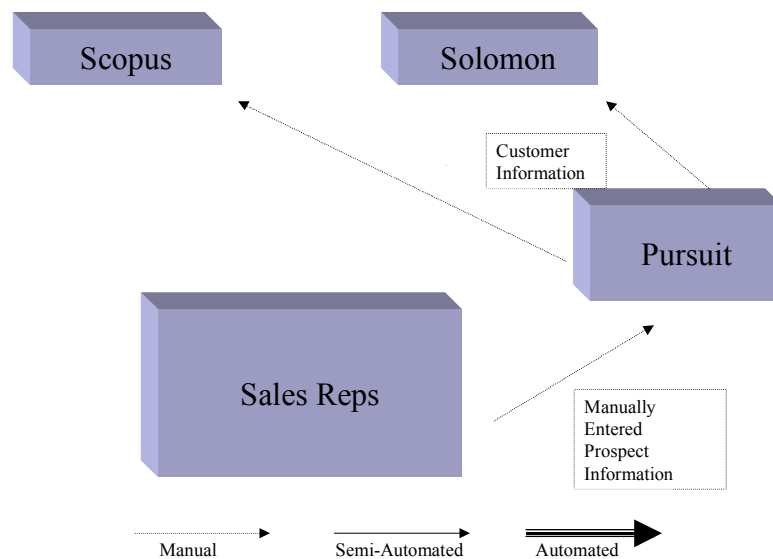
- Provide a foundation for an electronic infrastructure, which will eliminate costly error-prone manual processes.
- Integrate data/datasources and provide consistent representation.
- Create a foundation for an e-commerce environment.
- Electronically distribute products, services, and news information.
- Eliminate any structural limitations in lead processing and prospect database growth.
- Provide a self-updating "Partners Extranet" which will automatically post marketing reports, sales reports, product information, online ordering, and recent Eddie Donovan, Inc. news on a daily basis.
- Provide a self-updating Intranet that will automatically post marketing reports, sales reports, product information, and recent Eddie Donovan, Inc. news on a daily basis.
- Initiate sophisticated web-centric database driven joint ventures with well-known web presences.
- Lower the cost per sale for customers and resellers via the Ecommerce system.
- Automate Internet, Intranet, and extranet content updates for database driven content thereby lowering the cost of web maintenance.
- Lower the cost of customer and reseller service.
- Produce accurate sales and marketing reports vital for strategic planning and automatically deploy them on the corporate Intranet and Extranets.

I. Situation Assessment

The problems of most concern are:

- Manual information processes divided into many steps
- Multiple databases
- Vast amounts of inconsistent/unreliable data among the current networked databases.
- A non-existent electronic marketing infrastructure (email).
- Absence of an automated data entry solution for new prospects.
- An antiquated and unreliable web server infrastructure.

Exhibit 6 - Current ERM Infrastructure



1) Current Database Infrastructure

Eddie Donovan, Inc. currently operates three independent databases that do not communicate with each other (**Ex.6 Current ERM Infrastructure**).

Solomon is the account/order processing database utilized mainly by the sales and accounting departments. It is the most accurate database in terms of tracking current customers. From an electronic marketing standpoint, it would be the best database from which to extract information for email campaigns if it were not for the fact that it does not list customer emails.

Pursuit is the prospect database utilized mainly by the sales department. Once prospects are turned into customers their information is entered manually into the Solomon database. From an electronic marketing standpoint, this database is very valuable since it contains the email addresses of all our past customers/prospects.

Scopus is the customer support database that is utilized mainly by the technical support department. It usually holds the most current information of our past customers. Unfortunately, the information within this database is not linked to the Solomon and Pursuit databases.

There are problems in managing these databases since duplicated information cannot be cross-referenced. This makes it extremely difficult to generate a customer list based on information within two different databases as in the case of our recent email campaign during December 1998. To add to our discomfort, the Pursuit database is full of duplicates, faulty entries, and is not updated well. This is caused by the lack of incentive for our sales representatives to be more meticulous in entering data and managing the database or the burden of manually entering this data from multiple sources. This results in many hours of manually sorting duplicates and invalid entries before any mass emailing whenever lists are compiled from extracted data.

2) Current email Marketing Infrastructure

Our current email-marketing infrastructure is very basic. Once we have compiled a target list of prospect emails we enter them directly into Microsoft Outlook from which we then proceed to mail. For each mailing we configure the mail client to sort bad email returns and removal requests even though we currently have no way of updating Pursuit with this information.

3) Current Prospect Mining and Data Entry Mechanisms

The problems we have in organizing, updating, and extracting accurate data from our databases significantly discourage any attempt to set up an infrastructure geared towards integrating prospect data captured via forms on our external web site and responses from our email campaigns with our databases. An indispensable requisite of any successful email-marketing program is the ability to remove bad emails, subscribers, and prospects from an email list quickly and efficiently. It is very difficult to update customer/prospect information with data gathered from the web since MIS currently does not have the flexibility to create remove and bad email fields on the Pursuit database.

Customer and prospect data is entered manually by salespeople into the Pursuit database from:

- Printed reply cards
- Web forms
- Magazine “bingos”
- Incoming calls
- Incoming emails

Currently there is no application that prevents the entry of duplicate customers or prospects.

It is very difficult to create multiple sub databases within pursuit that can hold specific prospects/subscriber information pertaining to our many web forms because we do not have an automated data entry mechanism. We are also lacking a dedicated resource whose responsibility is to centralize the input of data and to ensure that the Pursuit database is as accurate and updated as possible.

4) Current Sales Process

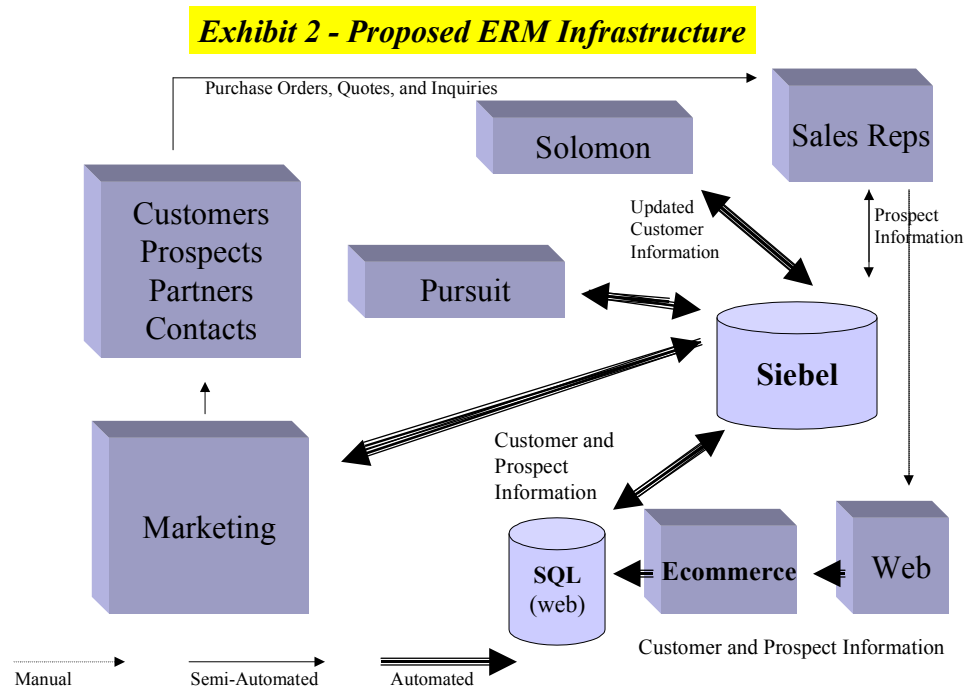
The sales cycle begins when leads are forwarded via phone, fax, or email to a sales representative. The leads, at that point, get entered manually into Pursuit and are labeled as prospects. When a sale is made to a prospect, that information is then manually entered into Solomon and Scopus databases by a sales support representative. The sales infrastructure is currently not set up for Ecommerce.

5) Current Web Server Infrastructure

Eddie Donovan, Inc. is currently using its very own Purveyor web server software platform for its external web site. Overall, it has worked very well over the past five years. However, Eddie Donovan, Inc. has recently experienced compatibility issues with newer third party server software products and cgi scripts. In 1998 there have been two episodes of improper file management where newer files were replaced by older duplicates. It is very likely that we are prone to problems of this nature given the age of the Purveyor client we are using. Given its current state of unreliability Eddie Donovan, Inc. risks potential bottlenecks in attempting an electronic download evaluation process on a grand scale.

II. ERM Objectives, Strategies, and Required Resources

This section highlights the objectives, strategies, and required resources are geared towards building an Enterprise Relationship Management (ERM) infrastructure that will maximize Eddie Donovan, Inc.'s sales and marketing capabilities in creating demand and awareness for products and services. The ERM infrastructure will be centered on a Siebel database, which will administrate the automatic data, exchanges between Siebel, Solomon, sales management package (Pursuit), and the SQL web interface (**Ex.2 Proposed ERM Infrastructure**).



1) Database Infrastructure

a) Objectives:

- Create a regularly updated database that combines all fields from Solomon, Pursuit, and Scopus into Siebel (**Ex.2. Proposed ERM Infrastructure**). The update process will need to be able to distinguish duplicate fields and update them based on their most current values.
- Create common company database where partners, customers, and prospects have an individual user ID number that can be tracked throughout the entire ERM infrastructure.
- Be in a position to formulate customized prospect lists quickly.
- Directly import prospect information generated from the web via automated third party application into main database or equivalent thus avoiding manual entry.
- Select or hire MIS/Sales/Support employees responsible for centralizing data entry processes, keeping data clean via preventative measures / maintenance, simultaneously managing over ten different prospect lists, and providing specified queries on demand.
- Import bad address returns and remove requests into main database or specific prospect lists. This will help avoid annoying customers who do not wish to be emailed and sort out invalid email addresses from our databases.
- Maintain an infrastructure geared towards sustaining credit card and business-to-business ecommerce.
- Automate prospect follow up based on date of initial or last contact.
- Achieve automated graphical data reporting of information stored in main database across the external web site, Intranet, and Extranets.

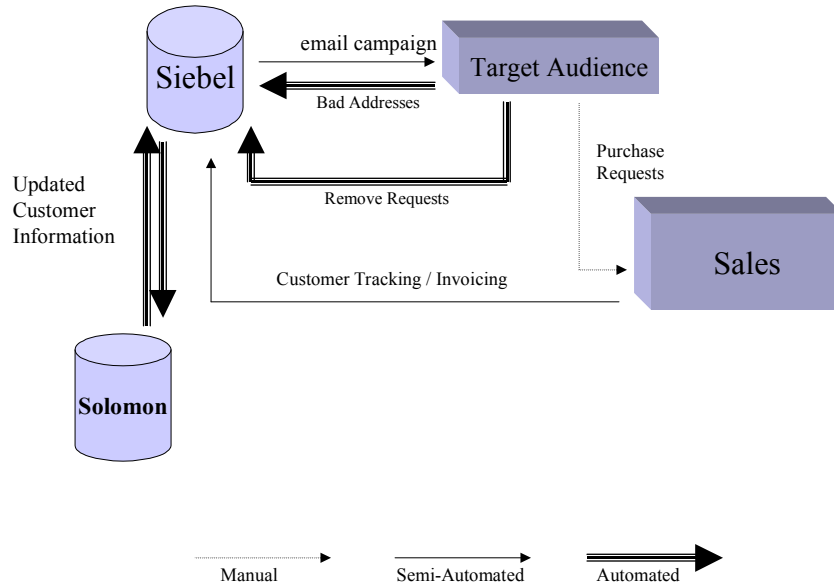
b) Top-Level Implementation Strategy:

- MIS is currently working on laying the groundwork for the staged implementation process for the Siebel database platform, which will replace Scopus (current support tracking database). Siebel will coordinate and reflect information off of Solomon (current account tracking database), Scopus, and Pursuit (current sales prospect database). MIS believes that Siebel is expected to be partially operational by Q3 1999 and fully operational by the new millennium.

- Centralize entry of current customer, bad email, and remove fields onto current sales prospect database (Pursuit) database and begin updating with most current prospect information on a regular basis.
- Set up a Microsoft SQL database and integrate it with the external web site. Customize forms to integrate with SQL database for automatic prospect data entry.
- Set up a Microsoft SQL database and integrate it with the ecommerce platform.
- Create environment to compile detailed sales and marketing reports that will automatically post themselves on the web, Intranet, or Extranets. Reports will be compiled based on information extracted from electronic commerce activity, direct mail campaigns, email campaigns, etc.
- Integrate Siebel with Solomon and shipping department.
- Ensure that steps are taken before Seibel integration to keep databases in communication with each other via semi-automatic updates. The EPIC Team (a year old team comprised by members of the accounting, sales, MIS, and support departments dedicated to resolving issues pertaining to internal database systems) is already working with PriceWaterhouseCoopers to clean up and improve the reliability of our current databases.
- **c) Required Resources:** To be determined.

2) email Marketing Infrastructure (Ex.4. Proposed Email Marketing Process).

Exhibit 4 - Proposed email Marketing Process



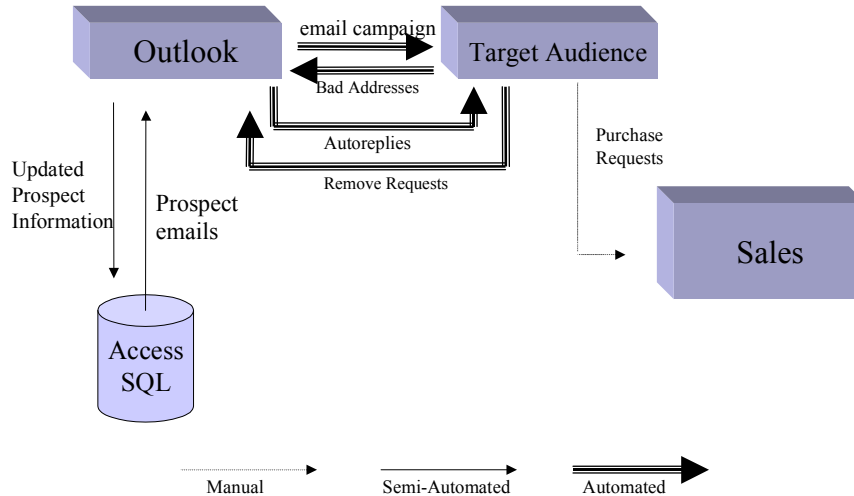
a) Objectives:

- Automate set up and maintenance of multiple marketing target audience databases containing information on suspects, prospects, customers, partners, and other audiences.
- Provide autoresponder functionality to web forms and email marketing campaigns.
- Import bad address returns and remove requests into main database or specific prospect lists. This will help avoid annoying customers who do not wish to be emailed and sort out invalid email addresses from our databases.
- Ability to enter data from multiple sources (i.e. Web, spreadsheets, databases, manually, etc.).

b) Top-Level Implementation Strategy:

- Customize ERM to provide email campaign execution and tracking capabilities.

Exhibit 5 - Proposed email Marketing Process Before Siebel



- Before Siebel integration mail customers via Microsoft Outlook while providing MIS with bad address and remove information to be edited in a Microsoft Access database (**Ex.5. Proposed email Marketing Process before Siebel**). Query Pursuit and Scopus databases for new customers and prospects before each mailing.

c) Required Resources:

- IIS server platform.
- Hire consultant(s) to write scripts that will capture information from the web and store it into an Access database on the server.
- Purchase and correct utilization of OCR and other automated data entry technologies.

3) Prospect Mining and Data Entry Mechanisms

a) Objectives:

- Directly import prospect information generated from the web via automated third party application into main database or equivalent thus avoiding manual entry.

b) Strategy:

- Work with Siebel to extract prospect information from the web stored in the SQL/Access database. Set up automated instant updates between Siebel and the SQL/Access database (**Ex.2 Proposed ERM Infrastructure**).
- Perform routine analysis of data originating from the web to filter out “dummy” entries.

c) Required Resources:

- IIS server platform.
- Hire consultant(s) to write scripts that will capture information from the web and store it into an Access database on the server.
- Purchase and correct utilization of OCR and other automated data entry technologies.

4) Ecommerce

a) Objectives:

- Provide ecommerce option for credit card sales with automated online verification.
- Provide ecommerce interface design based on prospecting/close model specified by the sales department.
- Provide ecommerce option for business to business sales.
- Educate sales support specialists about ecommerce infrastructure.
- Store customer data captured via ecommerce system on an SQL/Access database and integrate customer data on a regular basis Seibl.
- Sell software, provide quotes, track customer information, track prospect information, and provide customer order status information.

b) Top-Level Implementation Strategy:

- Implement Siebel, SQL, and Microsoft Commerce Site Server 3.0 compatible electronic commerce system. The system must be customized to mirror automate, and enhance the sales process as much as possible. The Microsoft Commerce Edition Site Server is the same architecture used for high volume and sophisticated electronic commerce sites such as www.dell.com. It will need to be customized to showcase products, provide quotes, store customer information, sell product, track order status, seamlessly integrate directly via the SQL database to Seibel, and automatically update Seibel with new information.
- Hire experienced consulting operation or outsource.

c) Required Resources:

- To be determined.

5) Web Server Infrastructure

Objectives:

- Perform effective evaluation campaigns on a grand scale that will support heavy download requests.
- Run the external web site on a server platform, which is compatible with leading edge server software business applications on the market.
- Implement third party server software applications to provide additional content for our users.
- Upgrade the level of sophistication of our web forms by adding autoresponder, databinding, and filter features.
- Ensure that proper >30mg download server requirements are met and ensure efficiency of an automatic PAK generator. Create a direct link from the ASP forms to Siebel (Scopus), Solomon, and Pursuit.

Top-Level Implementation Strategy:

- Install and maintain external web site on IIS server platform (currently in progress).
- Outsource cgi scripting or ASP scripting to develop more sophisticated web forms in an effort to automate lead development process (currently in progress).

Required Resources:

- Install and maintain external web site on IIS server platform (currently in progress).
- Consulting funds under \$10,000.

6) Extranet / Intranet Development

Objectives:

- An extranet is a web site targeting business partners. It must be designed to automate and speed up communication, media transfer (PDF, pricing sheets, selling materials, text, graphics, audio, software, video), transactions, and statistical analysis retrieval between Eddie Donovan, Inc. and its partners.
- Eddie Donovan, Inc. would need to consider the needs of its present base of small and large business partners (Compaq/ISVs) in laying out the objectives and the strategy of its extranet infrastructure. Different partners will have access to different content, pricing structure, COOP marketing dollar results, and advertising/product collateral. A database (SQL) will need to be set up to contain this information which will be delivered via the web. This structure will enable Eddie Donovan, Inc. to set permissions and passwords to different content for different partners. We may also opt for a portal strategy, which would enable our partners to customize the information they automatically bring up each time they access Eddie Donovan, Inc.'s extranet. Eventually the extranet would be fully integrated with Eddie Donovan, Inc.'s future (Siebel) internal systems.
- The extranet can be tailored to meet the special needs of our present and future OEM partners. Eventually the extranet would enable business to business ecommerce between Eddie Donovan, Inc. and its many business partners. A good model that we may want to emulate is Cisco's: an ecommerce site, which deals with complex products too difficult for the average corporate buyer but perfect for the savvy OEM partner.
- Implementing a viable extranet infrastructure will enable Eddie Donovan, Inc. to save time and money on updating content over many different partner sites. An extranet lends itself to be tied in with partners' Intranets and our Intranet to be tied into theirs. Initially we can provide a script to our larger partners that will automatically create a window on a web page of their choosing to point to a page on our extranet. This is very similar to the script I developed in conjunction with ZD-NET for the IP Resource Center Daily IT Update. However, there are issues we would need to discuss to if we wanted to tie in encryption or a password within that process.

III. Conclusions

Eddie Donovan, Inc. has made a commitment to implement Siebel (<http://www.siebel.com>) as its ERM infrastructure. Siebel is an ERM software package that can be customized to fully integrate with Eddie Donovan, Inc.'s current business applications. It is also web centric (can be interfaced via a web browser) and fully compatible with Microsoft SQL database.

The successful implementation of this proposed ERM infrastructure would enable Eddie Donovan, Inc. to conduct dynamic and automated one-on-one marketing with partners, customers, and prospects.

Eddie Donovan, Inc. will also benefit by being positioned to:

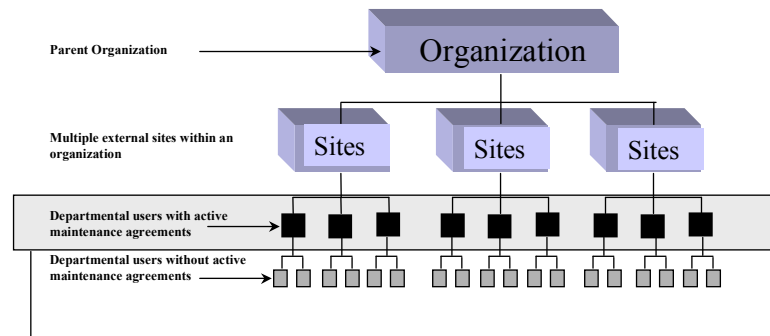
- Provide a foundation for an electronic marketing infrastructure, which will eliminate costly error-prone manual processes.
- Integrate data/datasources and provide consistent representation.
- Create a foundation for an e-commerce environment.
- Distribute electronically products, services, and news information.
- Eliminate any structural limitations in lead processing and prospect database growth.
- Provide a self-updating "Partners Extranet" which will automatically post marketing reports, sales reports, product information, online ordering, and recent Eddie Donovan, Inc. news on a daily basis.
- Provide a self-updating Intranet, which will automatically post marketing reports, sales reports, product information, and recent Eddie Donovan, Inc. news on a daily basis.
- Initiate sophisticated web centric database driven joint ventures with well-known web presences.
- Lower the cost per sale to customers and resellers via the ecommerce system.
- Automate Internet, Intranet, and extranet content updates for database driven content thereby lowering the cost of web maintenance.

- Lower the cost of customer and reseller support/marketing.
- Produce accurate sales and marketing reports vital for strategic planning and automatically deploy them on the corporate Intranet and Extranets.

Appendix

Within the ERM infrastructure a customer will be referred to as the user/purchaser of a license or group of licenses for a given department, workgroup, or site that has a current/valid maintenance contract. There may be several customers within a site and several sites within an organization (**Ex.1a. Customer Hierarchy**).

Exhibit 1a - Customer Hierarchy



The ERM infrastructure must be able to quantify:

- Total number of US and international customers by date of last purchase
- Total number of US and international customers with maintenance agreements by date of agreement
- Total number of licenses sold in the U.S. and abroad by date of last purchase
- Total number of customers in the U.S. and abroad by date of last purchase

- Total number of customer sites and organizations in the U.S. and abroad by date of last purchase

Eddie Donovan, Inc. has made a commitment to implement Siebel (<http://www.siebel.com>) as a component of its ERM infrastructure. Siebel is an ERM software package that can be customized to fully integrate with Eddie Donovan, Inc.'s current business applications. It is also web centric (can be interfaced via a web browser) and fully compatible with Microsoft SQL database. The web-centric nature of the Siebel platform will enable Eddie Donovan, Inc. to automate the distribution of prospect, sales, marketing, and product information among corporate Intranets and Extranets.

Many consulting hours with Siebel technicians and internal resources will be required to:

- Fully integrate Siebel with Eddie Donovan, Inc.'s Solomon accounting package
- Develop a fully automated electronic commerce system
- Develop a fully automated web-centric prospect generation system
- Develop fully automated direct marketing campaigns (email, fax, and direct mail).
- Implement detailed automatic marketing report mechanisms that will be pushed to the corporate Intranet/Extranets.