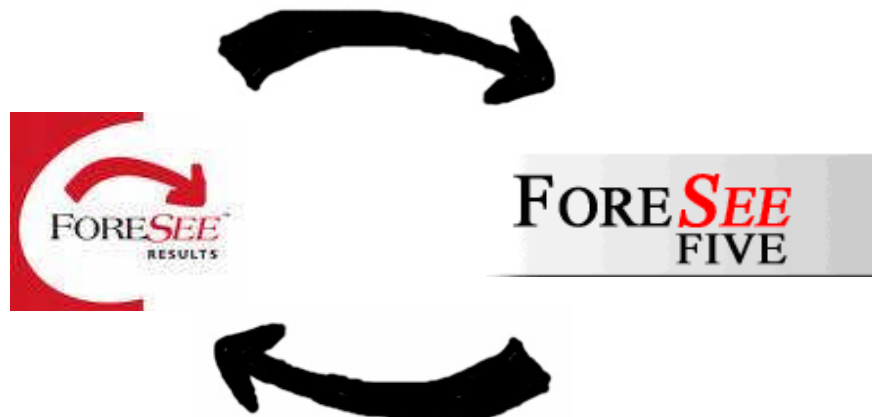


ForeSee Results

Recommendations for Improvement in Client Contact Management Process



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ForeSeeFive

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EXECUTIVE SUMMARY

The focus of the project conducted by ForeSeeFive, is to examine the process currently used by ForeSee Results to manage its customer contact information. ForeSee Results expressed concern about the efficiency of this process, which is integral to their capacity to generate revenue. Overall, ForeSee Results is doing a good job of managing client contact information. However, our observations and analysis of this process suggest that there is significant room for improvement. To this end, the following report highlights the weaknesses of the current process and also includes detailed recommendations for bettering it. Additionally, it contains information regarding the background of the project and explores the methods employed for analysis.

Our analysis of this process is based on thirteen interviews – eight conducted on-site, four via email and one via telephone – with employees from the marketing, sales (both inside and field sales representatives) and management departments. Based on the interviews, we developed six models that helped us identify, from different perspectives, both the strengths and the weaknesses of the process. Through further modeling, we identified key problems and generated ideas to address them. We then developed recommendations based on the refinement of these ideas.

Our analysis generated the following key findings: first, there are incomplete and inaccuracy problems with the collected customer contact information. This leads to wasted time, as members of the sales team have to spend a good deal of time finding the correct information. Second, SalesLogix - a customer relationship management application - has shortcomings. Most significantly, SalesLogix allows for data modifications that adversely affect the integrity of the stored data and also make it difficult to generate accurate reports. Finally, the unfamiliarity of employees who add customer contact information to SalesLogix with the end-uses of the information fosters data entry practices tailored to individual preferences, which at times contributes to the difficulty of managing the information and generating valid reports based on customer contact information.

Based on our findings, we recommend the following main steps for improvements: First, establish a list of minimum information details required to contact a customer. This serves the purpose of eliminating the time spent on updating incomplete information. Second, take advantage of the relationship with SalesLogix developers to request an auditing feature for SalesLogix. This would provide the ability to track changes made in SalesLogix and to roll back changes that adversely affect the integrity of the data. Third, organize workshops and discussion groups to make employees aware of the various uses of the contact information outside of simply contacting clients. These sessions will help employees adhere to existing data entry policies as they become aware of the value of doing so.

BACKGROUND

Overview of the Organization

ForeSee Results is an online satisfaction measurement and management company based in Ann Arbor, Michigan. It was co-founded in 2001 by Compuware Corporation, a leading computer services company, and CFI group, an international consulting firm. Since its inception, ForeSee Results has emerged as one of the most successful online satisfaction measurement and management companies in the nation. It employs the predictive methodology of the American Customer Satisfaction Index (ACSI), produced by the University of Michigan, and online survey tools to help clients understand how satisfaction with their websites has a direct impact on the future site behavior of current and prospective clients. ForeSee Results has over 250 clients across 22 private sector industries and measures more than 130 federal government websites.

ForeSee Results and the Project Focus

A large part of ForeSee Results' ability to maintain a competitive edge over other online customer satisfaction measurement companies is due, in large part, to its ability to develop and maintain client relationships. While the main purpose of the company is to deliver high quality service to its current clients, ForeSee Results is constantly seeking new clients. Currently, the company has more than 10,000 contacts stored in SalesLogix, ForeSee Results' customer relationship management system. As the number of contacts grows, so does the need for an efficient and well-structured method of customer contact information management. While the current process is sufficient, many factors point to the fact that the methodology might be refined.

An Overview of Our Analysis

Concerned about the efficiency of the process by which it currently manages customer contact information, ForeSee Results called upon us to evaluate this process and make recommendations for improvement. To this end, we analyzed all aspects of the management process – from the gathering of contact information to the utilization of this information in various company reports. Our analysis focused primarily on the way in which contact information is handled once marketing or sales representatives have received it.

Active Participants

Four primary groups participate in the process by which ForeSee Results manages client contact information. While there are other groups within the organization that utilize client contact information, the following groups are most directly involved in the process of managing it:

- **Marketing Department:** This department is largely responsible for the gathering of client contact information from various events. They serve as the primary promoters of ForeSee Results and often develop initial client relationship.
- **Inside Sales Representatives:** These individuals enter client contact information received from marketing into SalesLogix. They also contact potential clients about ForeSee Results' services and make important updates to client records in SalesLogix.
- **Field Sales Representatives:** These individuals meet with potential and existing clients and make important updates to client records in SalesLogix.
- **Management:** The CEO handles high-volume or high-maintenance clients and also puts potential clients in touch with appropriate sales representatives.

METHODOLOGY

Data Collection Methods

In order to get better understanding of the way in which ForeSee Results manages its client contact information, we conducted face-to-face interviews and made additional contact through phone calls and emails. We also spent two hours in an observation session examining the work process of a several employees. These observations and interviews helped us to become familiar with the settings and the work processes of the company. Furthermore, they enabled us to see the work process from the vantage point of the employees and to make recommendations based on their needs.

We interviewed employees in a three of ForeSee Results' departments, including the marketing, sales, and management departments. During each interview we examined the work processes followed on a daily basis, the way departments interacted with one another, and the culture of the company as a whole.

Collecting Materials

We gathered organizational charts, job descriptions, lead sheets, event contact sheets, screenshots of SalesLogix, and photos of the working environment.

Observations

By directly observing how employees completed tasks, worked in their environment and utilized their space, we were able to examine the actual processes that employees unconsciously follow throughout their work. This minute information was more difficult to extract through interviews, because employees often considered their daily work tasks as inconsequential actions. In fact, these seemingly insignificant actions allowed us to develop a better understanding of useful patterns within work processes.

Interviews

We conducted thirteen official interviews – eight conducted on-site, four via email and one via telephone. We interviewed staff in marketing, sales (both inside and field sales representatives), and managers. During interviews we asked people to describe how they performed and thought about their work. This helped us to get insight into the depth and details of their working processes.

We performed many of the interviews in the company's conference room. On a few occasions, we were able to conduct interviews in the workspace of the interviewees. The opportunity to interview in the staff member's space was especially valuable as it allowed us to witness how an employee conducted the work he described. For example, an employee would demonstrate exactly what buttons he clicked and how

he navigated through the system while explaining how he enters contact information into the database. Due to the fact that workspaces of each employee is limited to a cubical, consistently interviewing in this manner would have created a great distraction to those seated near our interviewee. Furthermore, it was often times more time efficient for the company to organize and carry out group meetings.

Emails

We used emails to set up interview appointments and to clarify short questions that remained unanswered after interviews. At times, the respondents expressed themselves more clearly in emails than in speaking face-to-face. However, it was slightly challenging to do follow up in this format because we did not always get immediate responses.

Phone calls

We did one interview via phone. This was an alternative way to do an interview, but proved effective when working around busy schedules. We conducted a phone interview with one of the managers at ForeSee Results.

While we found the phone interview an effective way to gather information, it was limiting in that we were unable to observe how the interviewee interacted with his working environment. Another issue with interviewing over the phone is that we were not able to observe the body language or facial expressions of the interviewee. These small movements could have clued us in on some other problem areas that we might have further probed.

Data Interpretation

Interpretation Sessions

Once we completed an interview, we conducted an interpretation session within 48 hours. These sessions served as a chance to update team members about the interview and to make sure that every team member was on the same page.

Usually two of us conducted an interview. One of us served as the main interviewer, and the other played the part of the note taker. During the interpretation session, the interviewer and note taker described what happened during the interview. Other team members captured notes and asked questions to clarify things they did not understand. These notes were valuable resources for our group and enabled us to conduct more in depth analysis.

Data Analysis

In order to discover issues in the process of managing client contact information, we analyzed the data through building different models. Each of these models gives different view of the work process. For reference, we have included many of these models in the Appendix. These models we used included:

- Work Flow Model
- Cultural model
- Cause-effect model (fishbone)
- Consolidated sequence model
- Artifact model
- SIPOC model
- Affinity diagram

Work Flow Model:

We used this model to examine the various channels of communication that exist between individuals in the company. We also explored the type of communication (direct or indirect, through email, telephone, etc). There were two major benefits we gained from creating this model:

- The flow of information helped us understand what information goes in and what goes out of each of the job roles. Furthermore, it enabled us to understand the format of by which the information is exchanged.
- This model also allowed us to easily find out the breakdowns within the current channels of communication, which helps us to develop more specific recommendations about how to modify work processes.

Cultural Model:

Through developing the cultural model, we gained a better understanding of the relationships between employees in the company. This was especially helpful in learning about the expectations that the employees had to one another and was especially useful in making us aware of certain tensions and breakdowns. For example, employees did not always recognize the expectations others have on them and as a result, were unable to meet these expectations.

Cause-effect Model (fishbone):

Often, there are multiple causes to one problem. In order to solve the problems, a detailed analysis is needed to find out the causes correspond to the problem. We used cause-effect model to help us find the root causes of the breakdowns we observed. Furthermore, we used it to categorize the problem that we had captured from previous interpretation sections.

During the interviews and email communications, we found that the breakdowns seemed to have several common sources. It means that instead of being distributed, the breakdowns tended to be clustered into groups. Besides the categorization, the cause-effect model also helped us find the root causes of the breakdowns. Through reviewing the list of the breakdown, we were able to follow the effects and discover their causes.

Consolidated Sequence Model:

We used this model to capture ForeSee's main activities as well as the related sub-activities. It was especially helpful in discovering overlap in work tasks and roles.

Artifact Model:

In every company, there must be some physical objects involved in the work process. We examined these models to find out what objects were used during the process, what their functions were, and what kind of information the objects carried. We also used the models to discover breakdowns in the work process, such as misleading or unclear fields in the forms they use. A close analysis of these artifacts led to thoughts about better artifact design.

SIPOC Model:

The SIPOC model is similar to the consolidated sequence model, but focusing closely on the objects involved in the work process, not just the process itself. More specifically, the SIPOC model helped us to identify:

- Who/what are the suppliers of inputs (here, the contact information)
- Who/what are the customers that create the needs.
- The requirements of the products from the customers
- The products created in the process

Affinity Diagram:

The affinity diagram helped us integrate all the notes we captured in our interpretation sessions. These paper notes were rearranged to different categories, according to their themes and, eventually, constructed a hierarchical representation that reflected major issues and concerns about the process of managing client contact information.

FINDINGS & RECOMMENDATIONS

First of all, it is important to point out that ForeSee Results is doing a good job managing its client contact information. Many of the procedures that guide this process are efficient and fit the company's overall standards for excellence. While there are many positive aspects of the current methods of gathering, storing and processing client contact information, our observation and analysis of the process suggests that there is room for improvement. The following section details certain nuances in the current process and provides suggestions for improvement.

Generally, our findings fell into three main problem areas. The first area deals with issues related to incomplete and inaccurate data, demonstrating how these issues lead to wasted time and larger inefficiencies. The second area summarizes issues with SalesLogix, emphasizing the fact that certain system deficiencies lead to decreases in productivity and inaccurate reports. The third section focuses on employees' unfamiliarity with work practices of coworkers and demonstrates how a lack of awareness of the end-use of information can lead to larger problems in the organization, such as inaccurate reports and forecasting. Most important, this section contains our teams' recommendations for making improvements to these various issues.

Each of the following three areas also contains references to data gathered during our conversations with employees. These references appear in the subsections entitled "specific examples from interviews" and are anonymized references to Pulp Fiction movie characters (e.g. I1B7: Duplicate entries in SalesLogix). A complete list of these data is available upon request.

INCOMPLETE & INACCURATE DATA

FINDING: ForeSee Results gathers incomplete customer contact information

Description of the problem:

- The contact information ForeSee Results gathers about clients from trade shows, webinars, direct contact and its website is sometimes incomplete (e.g. a sales representative receives a business card with a potential client's general company phone number, but not direct extension). While the company will always receive a certain amount of incomplete data, employees do not always ensure that the information they have gathered is complete. Incomplete information leads to wasted time, as more time is spent on verifying or acquiring the correct information.

Specific examples from interviews:

- IIB1: Vincent is frustrated with incomplete phone numbers (not direct extensions)

RECOMMENDATION:

- In order to eliminate incomplete contact information, ForeSee Results should attempt to avoid the problem before it happens. Sales and marketing should develop a standard regarding the minimum amount of client information needed when gathering customer contact information. This strategy should be implemented immediately, as it would lead to more accurate data collection. (e.g. Employee must obtain contact's full name, title, company name, direct telephone extension, and email address before entering contact into SalesLogix.)
- ForeSee Results should implement a policy whereby contact information cannot be entered into SalesLogix unless company representative has the aforementioned basic information about the client. Once the sales representative acquires the correct information and enters it into SalesLogix, she should then make a comment in the "notes" field of that entry, detailing how long it took her to obtain the correct information. These notes would serve as a way to track the efforts of the sales representatives. Due to the fact that employees already use SalesLogix as the primary repository for information related to a contact, asking employees to enter information into the SalesLogix note box would not deviate from current work practices.
- Entering information into the "notes" box is a short-term solution that might be better resolved by implementing an auditing feature to SalesLogix (see Problems with SalesLogix section).

FINDING: Data entered incorrectly into SalesLogix.

Description of the problem:

- Employees do not always enter correct contact information into SalesLogix. Relatively small errors in the spelling of a company name or entry of a phone number can lead to larger problems like inaccurate reports and wasted time. (e.g If employee enters company name as “Gap” instead of “The Gap,” the SalesLogix treats these company names as two different entries.)

Specific examples from interviews:

- I1B4: Contact information entry is prone to error
- I1B7: Duplicate entries in SalesLogix
- I3B3: Inconsistency of entering information such as company name.
- I0N5 Honey Bunny is interested in modifying the data entry process
- I2N16 Mia is open to using incentives to improve accurate contact information entering

RECOMMENDATION:

- Due to the fact that many of the errors that appear in SalesLogix are errors related to the spelling of company names, ForeSee Results could increase the accuracy of data entry by generating and maintaining a Master List of the companies it works with. Such a list could act as a reference source for employees when they enter contact information into SalesLogix. For example, an employee might come across a name of a company he is not familiar with. Uncertain about the way this company name appears in SalesLogix, he would consult this Master List to ensure accurate input into SalesLogix. This list should be in electronic file format and made available online. This list would be updated and maintained by an employee in either the sales or marketing department. The company should begin compiling this list immediately to aid employees in the data entry process.
- For more information on accurate data entry, we recommend the following reading: Sankar, C.S., “Reduction of Duplicate Names in Data Entry Forms.” IEEE Transactions on Professional Communication. 26:4 (1983) 204-208.

FINDING: SalesLogix contains stale contact information.

Description of problem:

- SalesLogix currently contains a large number of inactive contacts – contacts that are no longer valid because the primary contact has either left the company or the company itself no longer exists. Many employees expressed concern with having a large quantity of old data in the system; it means that

there is a greater potential of there being duplicate records and, furthermore, greater potential for adding valuable new information to these old records.

Specific Examples:

- I0N6 Honey Bunny is interested in organizing existing customer information
- I0N11 Mia says that there are issues with purging outdated contact information from SalesLogix
- I1B5 SalesLogix contains stale and unused contact information
- I2N15 Mia is open to using interns to update and correct errors in old records
- I3N39 Prospective client information may stay in SalesLogix for up to 2 years
- I3N46 Contact information is never deleted from SalesLogix

RECOMMENDATION:

- In the interest of having the most up-to-date client records in SalesLogix, we recommend that the company take steps to distinguish between old and current client contacts. Our first recommendation is for ForeSee Results to contact SalesLogix developers to see if there might be a way to distinguish between these old and new records. While this is a long-term solution, the conversation between ForeSee Results and SalesLogix developers should begin as soon as possible.
- In the case that no such technical solution is possible within SalesLogix, our second recommendation is to hire an intern to sort through the large quantity of records contained within the system. Instead of simply purging old records, the intern might transfer the content of these records to MS Word documents and save them on the ForeSee Results server. Undoubtedly, these records are important, as they contain potentially valuable information. Hiring a student intern to conduct this task would not distract current employees from their tasks and would also be cost-effective.
- A slightly more important consideration for keeping these records relates to the potential legal obligation to do so. As you may already know, Federal Rule of Civil Procedure 26(a)(1) was enacted December 1, 2006 and requires the disclosure of electronic documents and data in legal trials.

PROBLEMS WITH SALESLOGIX

FINDING: It is difficult to retrieve client contact history from SalesLogix

Description of the problem:

- Currently, all information pertaining to client (emails, comments, and notes) exists in a “notes” box in SalesLogix. But because SalesLogix does not contain a search function, finding pertinent contact information in the “notes” field is difficult. Employees waste time searching through notes field for this information.

Specific examples from interviews:

- I1B6: Mia feels that it is difficult to search current database for good necessary information
- I1N22: Mia wants to distinguish between emails, comments and notes In SalesLogix.
- I5N5: Jody records date and communication code in the “notes” box within SalesLogix
- I6N4 Pumpkin copies and pastes information from company website into “Notes” field of SalesLogix.
- I1N15 Email communication history between client and sales representatives is stored in SalesLogix
- I1N22 Mia wants to distinguish emails, comments and notes
- I1B6 Mia feels that it is difficult to search current database for good necessary information
- I1B3 Mia thinks that it is difficult to distinguish between routine emails and pertinent information within SalesLogix

RECOMMENDATION:

- ForeSee Results should implement a categorization scheme in the “notes” box of SalesLogix. Each client’s “notes” box would contain various headings, such as “Employee Modifications,” “Latest Contact with Client,” “Important Considerations,” etc. These sections would capture modifications related to the heading and make it easier for employees to search through relevant client information. The most current entry should be placed in the top of each section. For example, an inside sales representative might develop a particular categorization scheme in the notes box of one of a particular record. He and his field sales representatives would input data according to this scheme, allowing for a clearer understanding of pertinent modifications.
- This is a short-term solution that will allow employees to keep track of those who have made modifications to a client’s record. A longer-term solution is explored in the following recommendation regarding auditing capabilities.

FINDING: SalesLogix has no auditing capabilities.

Description of the problem:

- When contact information is modified in SalesLogix, there is no log to indicate which employee made those changes and why.

Specific examples from interviews:

- I1B2: Honey Bunny is concerned that SalesLogix does not track changes
- I2B2: SalesLogix doesn't automatically track/generate current clients
- I2B5: Can't track the change nor the person who edited to client information
- I4N16: Marsellus and Honey Bunny would like to see auditing capabilities for SalesLogix.
- I6N14 Fabian is frustrated that SalesLogix does not notify the user of changes.

RECOMMENDATION:

- Our first recommendation is for ForeSee Results to ask the developers of SalesLogix to build in a track feature. This would allow for SalesLogix to keep track of who made changes and why. This feature may take a long time to incorporate into SalesLogix and, as a result, the conversation between ForeSee Results and SalesLogix developers should begin as soon as possible.
- An interim solution would be to require employees to keep track of changes made to client records by entering this information into the record's notes box. For example, a sales representative would first create a heading such as "Employee Modifications." Once created, he would enter these changes beneath this heading. This would ensure that other employees would be notified of any changes in the record. Due to the fact that employees are already familiar with using the notes box, such a change would not drastically disturb current work practices.

FINDING: SalesLogix is slow to load when accessed remotely

Description of problem:

- SalesLogix is slow to load from the road. Consequently, some field sales representatives opt to enter and/or update client information when they return to the office. Because this information is not immediately available to inside sales representatives, these employees cannot determine whether a potential client has been contacted about particular issue. What is more, they may contact a client even after the field representative has done so. In essence, this is a communication problem that causes a lag in the work process. Overlaps like these make ForeSee Results appear unprofessional to clients and also wastes the time of employees.

Specific Examples:

- I1N3 Mia thinks that web interface will help with communication problems between inside and field sales representatives
- I1N3.1 Web interface will allow field sales representatives to access SalesLogix while on the road
- I3N3 Zed chooses to use SalesLogix only in the office
- I3N5 Zed writes client contact information on paper then transfers it to MS Word
- I3B6 It takes 20 minutes to login to Saleslogix for field sales representatives.
- I3N40 It can take up to 20 minutes to log into SalesLogix on the road
- I5N16 Jody's field sales representatives do not regularly synchronize his copy of SalesLogix when traveling.
- I5N17 Jody is excited about the new web interface because it will allow her to check system from home.
- I5N18 Jody is excited about the new web interface because data will immediately available and up to date.

Recommendations:

- While the new web-based system the company will soon implement is likely to alleviate problems associated with difficult remote access, a short-term solution may be needed to bridge this transition.
- During this transition period, field sales representatives should contact inside sales representatives (via email or telephone) when SalesLogix is slow to load or when company employees cannot update information immediately. This step would ensure an accurate and up-to-date exchange of information between inside and field sales representatives. Once informed, inside sales representatives could, if necessary, make changes to the client's record in SalesLogix.

UNFAMILIARITY WITH END-USE OF DATA

FINDING: Employees do not always understand how co-workers utilize data

Description of the problem:

- Many employees are unfamiliar with the way other employees use contact information. As a result, these employees do not always input or create the data that is necessary for their co-workers to complete their work tasks. For example, field sales representatives tend to have a good personal understanding of the likelihood of a sale. As a result, they do not always update Opportunity Manager, the software used to track the probability a sale. Not updating Opportunity Manager means that the CEO has a difficult time forecasting the company's potential revenue.

Specific examples from interviews:

- I3N29 Marsellus uses Opportunity Manger feature in SalesLogix to measure sales progress
- I3N30 Zed does not update Opportunity Manager often
- I3N31 Zed does not find value in the predictions of Opportunity Manager
- I4N8 Marsellus uses Opportunity Manager as a forecasting tool to assess future revenue
- I4N9 Opportunity manager estimates odds of closing a deal with client (high, medium, low)
- I4N10 Some Field Reps update their sale's progress through Opportunity manager
- I6N9 "Marcelleus wants us to use Opportunity Manager so we don't waste our time on low probability clients."
- I6N10 Pumpkin is supposed to update Opportunity Manager, but sometimes forgets.

RECOMMENDATION:

- In order to improve employees' understanding of the end-use of data and improve the company's underlying goals of increasing revenue, sustaining client satisfaction, and improving productivity employees should inform one another of how they use data and why it is important to the work they conduct. We recommend that each department facilitate quarterly discussion sessions inside their own department. This would be something of a forum where managers and staff could come together to engage in a conversation about the importance of data and its relation to other individual's work tasks.
- To help increase knowledge about the end-use of data on a company-wide level, we recommend that the company coordinate bi-annual workshops where departments would inform one another about how they use data.

CONCLUSION

As one of the industry's most successful online satisfaction measurement and management companies, ForeSee Results distinguishes itself from competitors in two important ways. First, the company employs a rigorous, well-known, and credible measure of customer satisfaction that allows for a consistently high-quality product. Second, it provides its customers with excellent service. While these two factors are integral in maintaining its market lead, weeks of observation and interviews with ForeSee Results employees illustrate that a significant part remaining competitive has a lot to do with the efficient management of contact information. The ability to attract and maintain clients requires a superb system of client contact management. Our analysis suggests that ForeSee Results is managing its client contact information well. However, this analysis also demonstrates that there are ways in which this process might be made more efficient.

Throughout the course of our time with ForeSee Results, ForeSee Five developed a thorough understanding of the current problems related to the process of managing client contact information. Generally, we noticed three main problem areas. We learned that incomplete and inaccurate contact information leads to inaccurate reports and wasted time – time that employees might better spend making sales or serving existing clients. We also learned SalesLogix is an essential part of the process of managing client contact information; and to improve the overall efficiency of the client contact management process, major improvements need to be made to the system. Furthermore, we discovered that it is important for company employees to have a basic understanding of how coworkers utilize client contact information. While it is not necessary for employees to learn everything related to other employees' work tasks, part of meeting the company goal of generating revenue requires that employees have, at least, an awareness of how others use data.

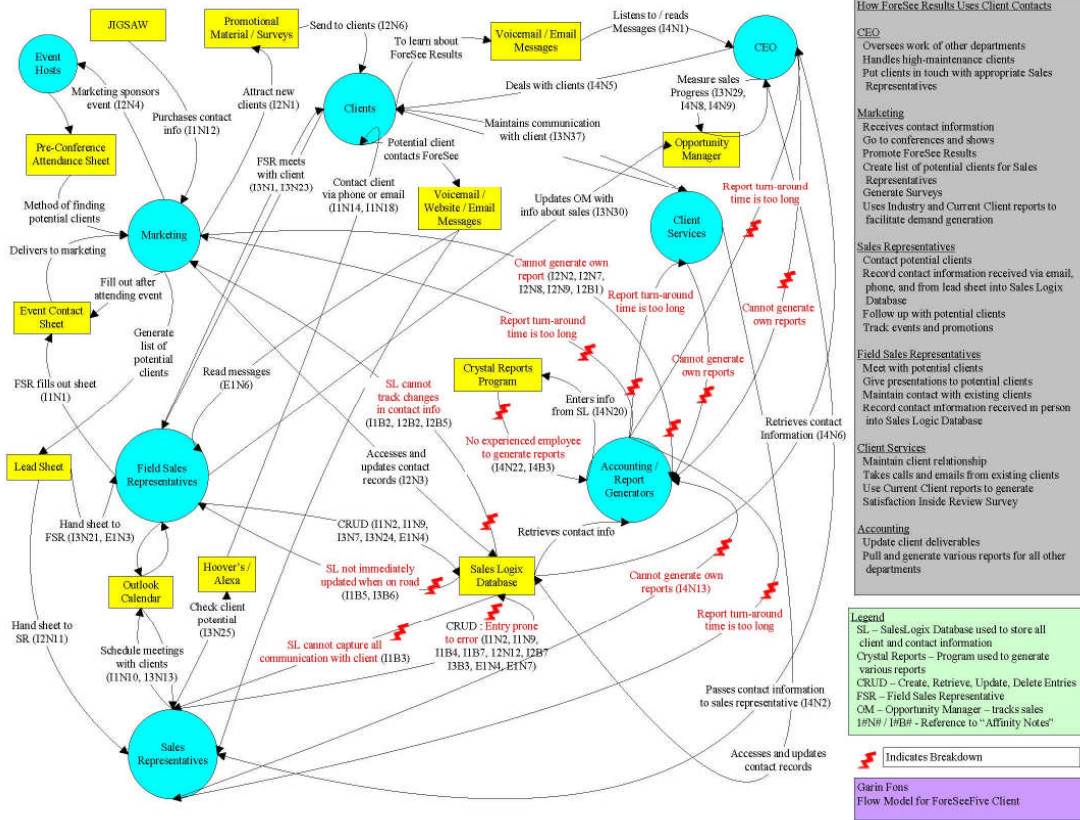
In the interest of furthering company goals to improve efficiency and continue revenue generation, we recommend that ForeSee Results implement the following main recommendations: First, in the interest of eliminating inaccurate and incomplete contact information, ForeSee Results should develop a standard regarding the minimum amount of client information needed when gathering customer contact information. Second, ask the developers of SalesLogix to design and implement an auditing feature for SalesLogix that allow employees the ability to track changes made to client contact records. Third, organize workshops and discussion groups to make company employees aware of the various uses of client contact information. These sessions will help employees adhere to existing data entry policies as they become aware of the value of doing so.

Implementing these recommendations, ForeSee Results can expect to see overall increases in efficiency in its employees, as they will not waste time repeating tasks and searching for information. Moreover, the company can look forward to the

possibility of securing more revenue. Because employees would have more accurate data, they could more effectively target companies with products and services. Finally, the company is likely to see an increase in employee morale, as new features within SalesLogix would not be constricting. Instead, these features would allow employees to be more productive and provide them with control that is currently not available.

APPENDIX

Work Flow Model



Explaining the Model:

Collection of Contact Information:

ForeSee Results collects client contact information from several sources. This includes contact information they receive via phone calls, emails, and website. It also comes from sponsoring marketing events (pre-attendance conference sheet), meetings with clients, and JIGSAW (<http://www.jigsaw.com>). Regardless of who initially encounters the contact information (Marketing or CEO) and who maintains the client relationship, all contact information is eventually forwarded to Sales.

Processing Contact Information:

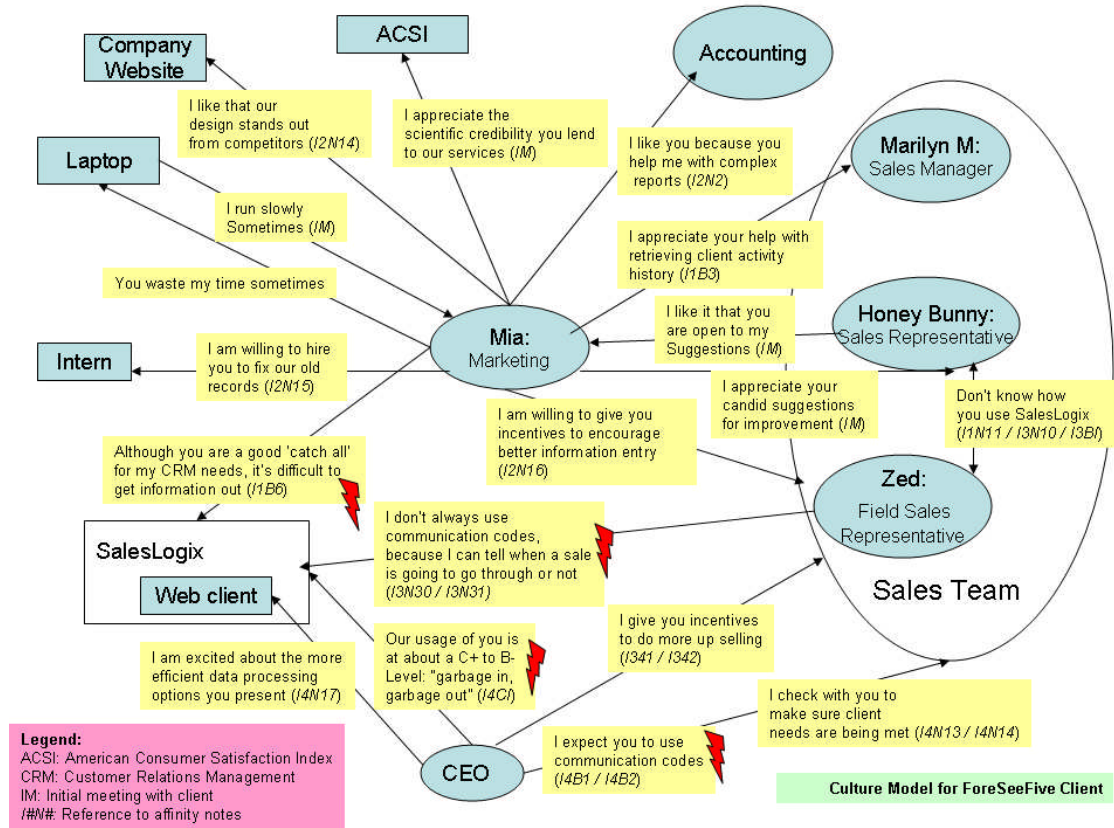
Sales and Marketing play the largest part in processing contact information. When a field sales representative encounters a client (in person, via email, etc) they fill out an even contact sheet and deliver it to Marketing. Marketing compiles these contacts and creates a Lead Sheet, which is then distributed to both inside sales representatives and field sales representatives. Marketing also puts “filtered” contacts from pre-attendance conference sheet onto the lead sheet. The CEO will also forward sales representative client information if he has made contact with clients. Inside sales representatives and field sales representatives then create records for new clients and update the activity history (details of past communications with client) of existing clients in SalesLogix – a customer relations manager application. Client Services and Marketing will also access and update changes in the SalesLogix system.

Use of Contact Information:

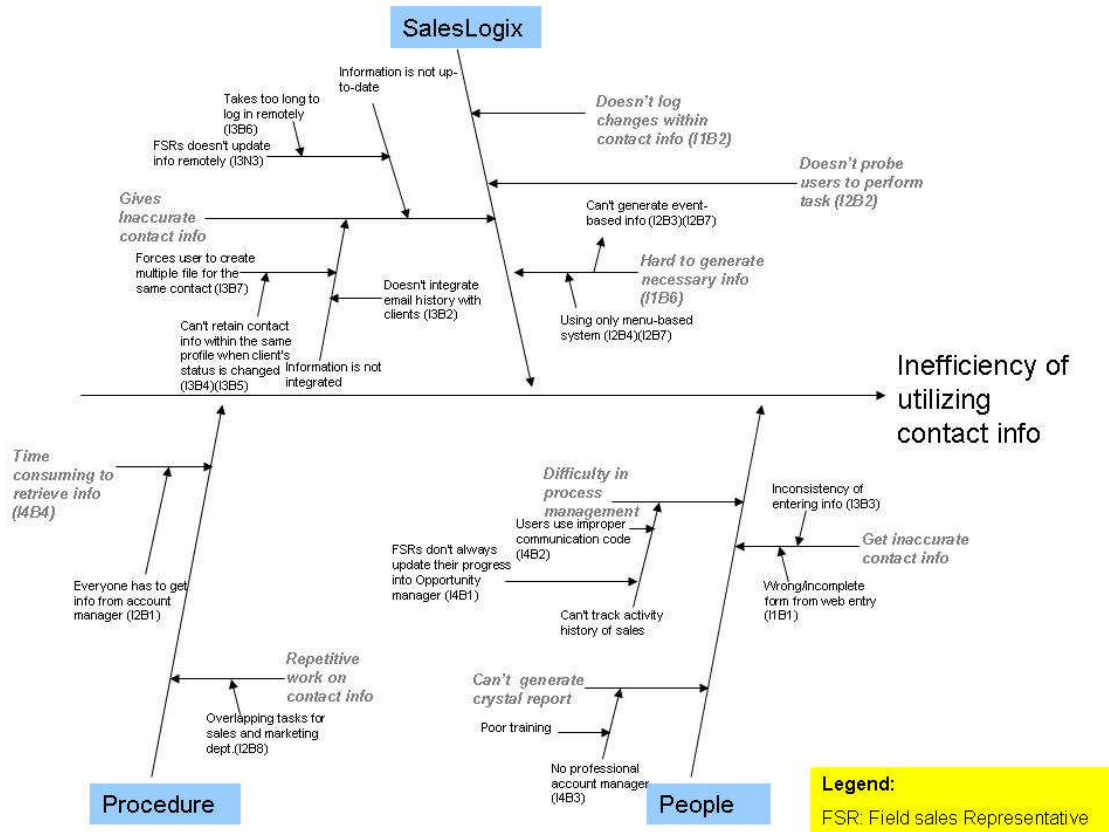
Based on the contact information stored in SalesLogix, Marketing can generate lists of customers in order to promote ForeSee Results’s services. Sales can use the information to check the potential of potential clients (using the Alexa Index and Hoover’s website) and contact them to make sales. Client Services can use the information to monitor and contact current clients about the status of their accounts. The CEO can use the information to ensure that clients are being serviced in a timely manner. He can also forecast future revenue opportunities and measure sales progress using a program called Opportunity Manager.

ForeSee Results also uses contact information to generate a variety of reports, e.g. Industry Reports, Current Client status reports, and Forecasting reports. Currently, all reports of this manner are generated by a report generator in Accounting. While each department has expressed interest in being able to generate their own reports, SalesLogix does not provide this feature. Using both SalesLogix and Crystal Reports, the report generator must generate these reports for all other departments. As a result of inexperienced staff and the need to pull information from SalesLogix to enter it into Crystal Reports means that the turn-around time for these reports is longer than desired.

Cultural Model



Cause-Effect Model (Fishbone Model)

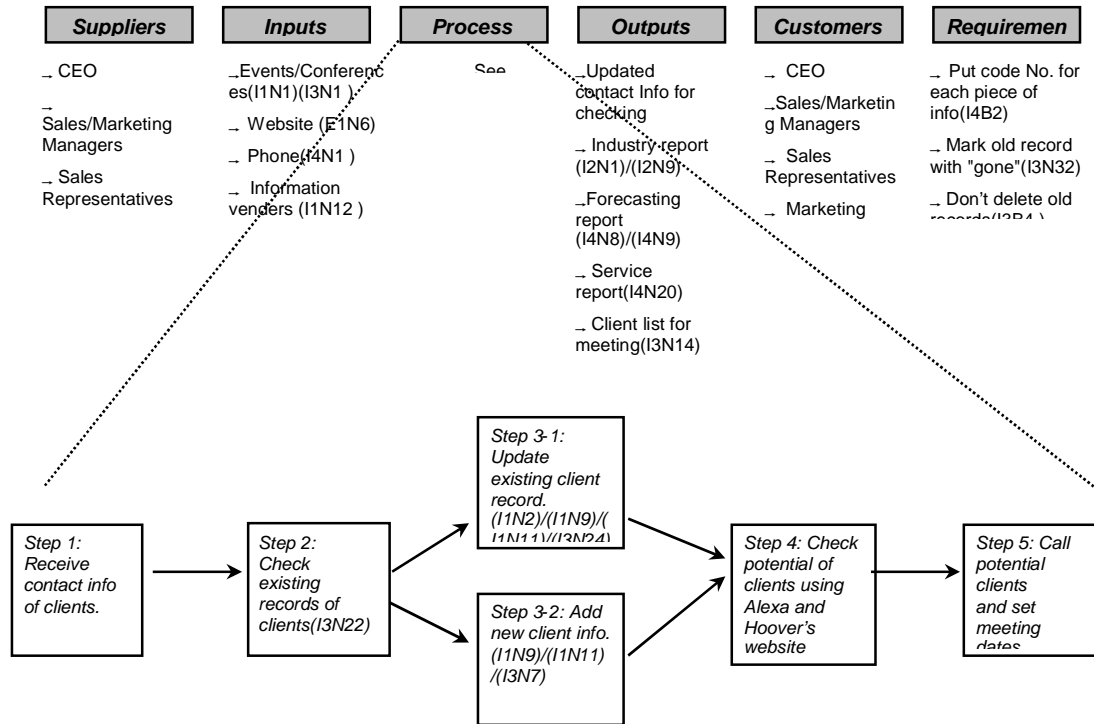


Background and context of the model

This model focuses on the breakdowns and their causes. Since we are concentrating on the contact information, the main effect we can find is how they use the information they have collected. ForeSee Results has many troubles using contact information efficiently. I found that all the causes to the problem can be categorized into three main areas: People, Procedure, and System (SalesLogix) itself. The system causes relate to the performance and the design of the system. The people causes relate to the problems occur when people deal with the contact information. The procedure causes relate to the steps that to finish the tasks. Main causes are in italic and grey font. Every effect may be the cause of another effect. I kept finding the causes for the effects until there are no causes that can be found.

SIPOC Model

SIPOC for ForeSeeFive Client



Affinity Diagram

