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Services Overview

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Apex IT knows CRM. Our experience over the course of hundreds of CRM engagements tells us that success is dependent on more than just a successful software implementation. Companies that achieve long-term success take a more holistic approach to their CRM initiatives—an approach that includes up-front strategic planning and requirements definition, business process analysis and modeling, data analysis and cleansing, change management and post-implementation training and education.

To help clients that are interested in building the foundation for long-term CRM success, we have developed a true “turn-key” CRM solution that leverages our collective skill set and subject matter expertise at all points along the CRM implementation continuum. Our experience spans the full spectrum of CRM applications including sales, marketing, field service, help desk, call center, analytics and portal technologies. Whether it’s helping a client select and purchase the right application, conducting a workshop to educate client representatives on functional area best practices, or leveraging CRM technology to create world class contact/call centers, Apex IT has the experience needed to do the job on time, within scope and within budget.

In the following document, we highlight each of our core services. And to provide context, we have placed these services into five distinct categories, each representing a certain phase of the overall implementation lifecycle:

- **Strategic Services**—Services in this category are aimed at providing clients with the knowledge and information they need to: 1.) Make an informed CRM buying decision, 2.) Develop a successful plan for new CRM initiatives, and 3.) Develop successful customer satisfaction and/or demand creation/retention programs.
- **Planning Services**—Post-application selection/purchase services that are aimed at preparing clients for a successful application implementation. These services include business process improvement, and technical analysis and assessment.
- **Implementation Services**—These services represent the foundation of Apex IT’s business. Implementation services include hands-on technical application implementation, enterprise process modeling, technical integration and data quality.
- **Upgrade Services**—Services aimed at helping clients migrate from their older, legacy CRM applications to newer releases. While our business has historically been rooted in PeopleSoft CRM and Vantive applications, we are CRM “agnostic” and have the ability to complete upgrades involving Oracle CRM, Siebel and SAP. Also included in the general Upgrade Services category are activities focused on maximizing the efficiency and capabilities of legacy applications.

- **On-Demand Subject Matter Expertise**—Clients often have internal resources they can leverage during a CRM application implementation. However, there are instances wherein internal client teams lack expertise in a specific functional, technical or business-related area. For customers in this situation, Apex IT offers “on-demand” subject matter expertise—i.e., subject matter experts (SMEs) that work with clients on a short-term or part-time basis to fill specific knowledge and skill gaps.
- **Managed Services**—Our managed services offerings ensure that companies are equipped to address inevitable post-implementation technical glitches and bugs, and also to keep up-to-speed with the release of “patches” (i.e., fixes to specific features/functionality, related application tools, etc.) from software vendors. We provide a maintenance/service contract in which our technical consultants—working off-site in the Apex IT offices—proactively monitor and manage the new implementation.

Strategic Services

Based on our CRM implementation experience, we have learned that failed CRM implementations are often a direct result of a lack of up-front planning. To help our clients avoid common implementation pitfalls—and set the stage for long-term CRM success—we offer the following strategic consulting services:

- CRM Assessment and Selection
- 3-to-5 Year CRM Strategic Plan
- ROI Analysis and Assessment
- Executive Education Workshops
- Functional Area Best Practices Workshops
- Project Management Service—Strategy Development

CRM Assessment and Selection

This service is aimed at organizations that have identified a need for a CRM solution, but have not determined which solution is right for their business. During this assessment, Apex IT Business Consultants work with client stakeholders to analyze, define and document the business, functional and technical requirements for the new CRM initiative.

Once those requirements are properly defined, Apex IT evaluates CRM applications and modules to identify the system that best fits the defined parameters and project budget. Once the appropriate system is identified, Apex IT provides input and assistance during negotiations between the client and the selected software vendor, and assists in the contract review process.

3-to-5 Year CRM Strategic Plan

Changes to a company’s business model and business processes are often unpredictable. Sometimes, these changes can be accommodated by an existing CRM system through business process re-engineering or additional application customization or configuration. In some instances, however, the pace and scope of changes surpasses the capabilities of the existing CRM application.

Moreover, external market events can affect a company’s overall CRM strategy, such as the recent Oracle/PeopleSoft acquisition.

As a hedge against these unforeseen changes, Apex IT offers a long-term planning service. This 3-to-5 year strategic planning service is intended for three distinct types of clients:

- Larger organizations that have implemented an enterprise CRM application but have many different constituencies with diverse CRM needs/requirements. Apex IT business consultants work with these organizations to design a long-term strategic plan that leverages the original CRM purchase but addresses the specific needs of the different audiences. By considering current business realities and anticipated changes to the business model, this plan clearly defines each stage of the long-term CRM initiative, how it impacts and benefits different constituencies, deliverables required by each audience, estimated costs, and expected ROI.
- Smaller organizations in the beginning stages of their CRM initiative. In these instances, we work with the client business owners to determine long-term needs and requirements, budget parameters and the overall corporate desire for change. We then build a custom plan for either the implementation of CRM, or the improvement of existing CRM.
- Organizations that have implemented legacy PeopleSoft or JD Edwards applications and are concerned about the long-term implications of the Oracle acquisition. With Apex IT's deep experience implementing a variety of CRM platforms, we can help PeopleSoft CRM customers develop long-term strategic plans to guide their eventual migration to the combined PeopleSoft/Oracle CRM product.

ROI Analysis, Assessment and Business Case Development

Given the costs associated with the implementation of a new CRM application, it's important to clearly identify, document and articulate the anticipated return on investment. Projected ROI needs to be comprehensive: a CRM implementation doesn't just touch IT, it involves a significant investment from multiple business groups and constituents. That includes top-level executives and business owners, IT/IS representatives, and employees that will use and manage the new system on a daily basis.

It's easy to understand the apprehension that keeps business owners from pursuing a new CRM initiative. To help alleviate those anxieties, Apex IT offers clients a Return-on-Investment Analysis and Assessment service. Over the course of this engagement, Apex IT business consultants work carefully to identify and document all project costs and compare them against the efficiencies that can be achieved with a successful CRM implementation. We then work with client stakeholders to help them articulate the business value and impact of the proposed CRM solution clearly and succinctly.

Executive Education Workshop

Often, a new CRM initiative doesn't get off the ground because of hasty decisions made by client executive teams. If an executive with decision-making power can't see the value of CRM, he or she will be hard-pressed to make the necessary investment. In many cases, the inability to see value is directly related to a lack of information and education—information about the capabilities of a CRM application, and education about the purpose and benefits of customer relationship management.

Apex IT has created a cost-effective service to bridge that information/education gap. For a nominal fee, Apex IT business and functional consultants will lead an interactive, on-site workshop with a client's top executives to educate them on the capabilities of CRM, its costs and benefits. This workshop is an opportunity for executives to ask questions and pose

objections to qualified CRM subject matter experts. The results of this workshop are then compiled into a summary report that is presented to workshop participants.

Functional Area Best Practices Workshop

While the primary business driver behind a new CRM initiative is usually the desire to improve customer relationships, there are more specific drivers that relate back to specific functional areas such as help desk, customer support, sales force automation and marketing. Through our implementation experience, we have learned how CRM technology can be used successfully to improve the performance of these different business areas. Moreover, we've gained insight into the best practices of companies that have successful help desk operations, automated and streamlined sales operations, CRM-driven and organized marketing campaigns, and award-winning customer service operations.

For companies interested in learning more about these best practices, and the role CRM can play in improving the business performance of different functional areas, we offer a series of Functional Area best practices workshops. During these half- to full-day workshops, Apex IT CRM subject matter experts lead an interactive presentation about what successful companies are doing in these different areas, how they have used CRM to reduce costs and increase efficiency, and how best practices and lessons learned can be applied to the client's particular business.

Project Management Services–Strategy Development

In addition to the specific strategy phase workshops and analysis/assessment engagements, we offer general project management services to help guide internal client teams through the CRM strategy development effort. Apex IT project managers can marshal the necessary resources, help internal teams set realistic goals and deadlines, and keep team members on task so that those objectives/deadlines are met.

Planning Services

Enterprise Business Process Analysis and Improvement

Apex IT understands that CRM technology is a means to an end, not a solution unto itself. And many CRM initiatives fail because of poor business processes. To build the processes needed to support a new CRM initiative, it's important to first analyze current processes to identify performance gaps. At the end of this analysis and assessment, Apex IT consultants are in a position to make solid recommendations on new process design—a key component in the development of a comprehensive CRM roadmap.

Enterprise Process Modeling

By aligning business objectives with IT priorities, enterprise process modeling becomes the framework for guiding success and driving ROI. Because of our intimate understanding of the capabilities of products like PeopleSoft and Oracle CRM, as well as the issues associated with both demand creation and service lifecycle management, we can help our clients develop efficient, scalable and flexible business processes that improve the quality of customer relationships, and ultimately, boost bottom-line business performance.

CRM Roadmap Development

To ensure that a CRM project is executed on time and within budget, it's important to have a concise plan of action that clearly defines the roles and responsibilities of each party (client and vendor), the different phases of the project, and the tasks and activities involved in each phase. It takes a considerable amount of CRM implementation experience to create an accurate and concise plan of action (otherwise known as a project “roadmap”).

For companies that lack the project experience and subject matter expertise needed to develop a winning implementation roadmap, Apex IT offers a CRM roadmap development consulting service. The output of this engagement is a comprehensive tactical roadmap document the client can use to guide the coming application implementation. Whether it's done with internal resources or in conjunction with an outside partner.

Project Charter Development

After a company has settled on a CRM application and has received buy-in from the necessary decision-makers, the next logical step is the development of a project charter. The project charter is an opportunity to set boundaries for the coming application implementation project. It's important to note that the project charter is not a tactical roadmap document. Rather, it's a summary of project goals and parameters that helps clients manage project scope.

Apex IT business consultants guide client stakeholders through the project charter development process. By leveraging Apex IT's experience and expertise, clients can rest assured that their project charter will be comprehensive, accurate and, most importantly, useful.

Implementation Services

PeopleSoft CRM Application Implementation*

PeopleSoft CRM implementation services form the very core of our current value proposition and service offering. Apex IT has completed more PeopleSoft CRM 8.x implementations than any other independent consultancy—a fact based on the analysis of PeopleSoft executives, not anecdotal evidence.

Combining proven PeopleSoft CRM experience and subject matter expertise with a “battle-tested” implementation methodology, our consultants know how to make a CRM implementation successful. We understand how to maximize out-of-the-box application functionality, how to navigate complex technical integrations and how to customize different modules within the PeopleSoft CRM suite to meet the unique business challenges of each individual client.

Oracle CRM Application Implementation

Our CRM experience extends beyond the legacy PeopleSoft CRM and Vantive products. Apex IT consultants have extensive experience developing integrations between PeopleSoft CRM and a supporting Oracle database. In addition to our knowledge of the Oracle database product, we have consultants on staff with direct experience implementing the Oracle CRM application. Those consultants partner with clients that are interested in Oracle CRM to complete full-cycle application implementations.

Change Management

Implementation of a new CRM system amounts to a major sea change in the way a company does business. If not planned for correctly, a change of this magnitude can cause confusion, and worse, paralysis and resentment. To help organizations create a smooth transition from the legacy CRM environment to the new one, Apex IT offers a change management consulting service that is firmly rooted in industry best practices and our hands-on CRM implementation experience.

* It's important to note that Apex IT is now an official member of the Oracle PartnerNetwork. And as our relationship with Oracle grows, we're in a great position to help new PeopleSoft CRM customers maximize available Oracle support services and add-ons/enhancements to the PeopleSoft CRM product. We're also available to help our clients develop migration and transition plans in advance of the release of the combined PeopleSoft/Oracle CRM product.

During the course of this consulting engagement, Apex IT business consultants work collaboratively with key CRM players and business owners to map out a comprehensive change management plan that takes into consideration each phase of the coming CRM implementation/upgrade; the constituencies within the organization that are impacted by the change; and recommendations on ways to mitigate concerns, fears and the overall impact of the change. In addition, we create change communication documents, facilitate workshops to help communicate with stakeholders and work directly with end-users to make them feel involved in the process.

Custom CRM Application Development

A custom development approach helps businesses save license fees and reduce maintenance costs, while allowing them to deploy extensive customizations for their business. To this end, many organizations see a custom solution, rather than a packaged application, as the best way to cost-effectively achieve their CRM objectives. With our extensive knowledge of CRM industry best practices and enabling technology, Apex IT can develop custom CRM applications that meet a company's specific needs.

Data Cleansing

Apex IT offers services to help clients organize and streamline their important customer, product and/or partner data before actual implementation. We also offer a more complete data-cleansing service for companies that wish to “cleanup” their core data during actual application implementation. During a typical data cleansing engagement, Apex IT data experts work to apply agreed-upon naming conventions to important data, delete redundant and overlapping data, and organize data in a way that conforms to the features and functionality of the new CRM application.

Client IT/IS Staff and End-User Training

Apex IT understands the value of proper training. If client IT/IS staff aren't provided with the necessary training, they will have problems maintaining the new CRM system in the long run. Similarly, without proper training, end users will grow frustrated with the new system, virtually guaranteeing project failure. To create the foundation for long-term CRM success, Apex IT offers its clients a suite of training services.

Apex IT trainers are available to conduct on-site, instructor-led training sessions for various client audiences; can lead “train-the-trainer” sessions; and can author content for print-based training materials and distance learning (e-Learning) modules. All Apex IT trainers are familiar with instructional design theory and the latest trends in adult learning.

Enterprise Architecture Review and Design

An engagement intended for the implementation phase of a CRM initiative in which Apex IT technical consultants work to conduct a detailed audit and review of a client's enterprise architecture. The purpose of this audit/review is to identify limitations, potential problem areas and the overall impact of the new CRM application on the current architecture.

Armed with the results of this review—and an understanding of the technical requirements of the particular CRM application—Apex IT can redesign the supporting technical architecture so that the new CRM application functions according to expectations.

Computer/Telephony Integration

Apex IT has significant experience helping its clients leverage CRM technology to build world-class call center operations. Our team is well-versed in the commonly used CTI/telephony systems (e.g. Genesys) that form the backbone of those operations. Moreover, we have established partnerships with companies that are on the cutting edge of

IVR and Natural Language Speech technology. Working through our key CTI partners, Apex IT helps clients integrate the CRM applications in their call centers with these technologies to create a more efficient and productive help desk, field service, self-service and/or customer support operation.

Project Management–Implementation

Apex IT offers clients that are conducting their CRM implementation in-house a project management service to augment available internal resources. Apex IT project managers provide unparalleled subject matter expertise and project leadership skills. They can keep an implementation on track and within budget—a difficult task for untested internal project managers with little CRM experience.

PeopleSoft CRM Upgrade Services

Having completed multiple CRM application upgrades involving multiple products and modules (PeopleSoft, Vantive, Siebel), Apex IT knows what it takes to make a CRM upgrade project successful. We are particularly skilled and experienced in Vantive-to-PeopleSoft migrations and PeopleSoft-to-PeopleSoft updates, including PeopleSoft 8.9 upgrades. In fact, PeopleSoft hired Apex IT to help test and review 8.9 prior to its release last summer.

Vantive Platform Migrations

In recent years, Apex IT has completed more than two dozen Vantive-to-PeopleSoft CRM 8.x migrations. Our ability to complete these platform migrations quickly and effectively is directly related to our knowledge of the feature and functionality set of the Vantive product. During a Vantive migration project, we work carefully to ensure that the most valued Vantive features and functions are replicated in the new CRM system. We also make sure performance issues associated with the Vantive product are not replicated in the new environment. In each case, we control project costs by maximizing the out-of-the-box functionality of the new system.

PeopleSoft CRM Upgrade and Migration

This is a true turn-key PeopleSoft CRM upgrade service. At the beginning of this full-service upgrade and migration engagement, Apex IT business, functional and technical consultants work collaboratively with client stakeholders to define requirements for the application upgrade project and conduct a fit/gap analysis for the purposes of identifying gaps in out-of-the-box application functionality. Once the integrations and application customizations have been clearly defined, Apex IT executes the technical upgrade.

PeopleSoft CRM Upgrade Assistance Service

This suite of PeopleSoft CRM upgrade assistance services is intended for organizations that need assistance in specific phases of the PeopleSoft CRM upgrade/migration lifecycle. Services are available at all points along the upgrade timeline and include: ROI analysis, requirements definition, product selection assistance, project management, process mapping, fit/gap analysis and architectural design assessment.

A description of available Upgrade Assistance services follows:

- ROI analysis. As with full-blown CRM implementations, clients should take the time to understand the cost impact and potential ROI of a PeopleSoft CRM upgrade project. For companies in this situation, Apex IT offers a consulting service aimed at helping the client make a “go/no-go” decision in terms of a PeopleSoft CRM upgrade. During an upgrade ROI analysis, our business consultants work with client executive and management teams to determine and document project costs, as well as the potential

ROI for the new application based on its enhanced capabilities. Just as importantly, our team works with client stakeholders to create a process by which final ROI will be measured once the new system has been implemented.

- Requirements definition. Given that most internal client project team members have never been through a major CRM application upgrade, it's not surprising that most can only identify between 10 and 20 percent of their business, functional and technical requirements. Our experience across the PeopleSoft CRM product suite gives us insight into the requirements of contact center, sales, marketing and support operations. We use that experience in a requirements definition engagement to help our clients identify not only the most obvious requirements, but less obvious requirements that can ultimately make or break the entire CRM upgrade initiative.
- Project management. Apex IT can provide an experienced project manager to lead a client's upgrade project team. We add value by applying our proven implementation/upgrade methodology, our project management expertise and our previous implementation experience.
- Fit/gap analysis. When a client has identified a new CRM application to replace the old one, they will frequently request assistance in understanding the gaps between their stated requirements and "out-of-the -box" application functionality. To clearly identify these feature/functionality "gaps," Apex IT offers its clients a fit/gap analysis service. At the end of this analysis, clients will have a clear idea of what customizations will be necessary to meet their functional expectations for the new application. This information can be used to justify expenditures for additional customization or, conversely, to pare down "nice-to-have" functionality to remain within the original project budget. Our technical consultants also identify how the client's system architecture will change, when it will change and related costs.

PeopleSoft CRM Optimization Review

This service is targeted at PeopleSoft CRM clients that are not interested in a full-fledged application upgrade but are interested in optimizing their current CRM environment. In this context, environment refers to the different components that work together to support the PeopleSoft CRM application: the back-end database, the network, the operating system and the associated business processes. During the course of this consulting engagement—typically around two to three business days in length—a seasoned Apex IT CRM consultant works collaboratively with client IT representatives and end users to provide quick direction regarding optimization approach, optimization costs and expected results. And we follow the same basic methodology whether the optimization review is application-focused or business process-focused.

Deliverables for this kind of engagement are generally standardized and include:

- Situational summary
- Findings and recommendations
- Suggested next steps
- Potential solutions
- Brief executive presentation

PeopleSoft CRM Performance Tuning

This type of engagement is focused on troubleshooting to improve the performance of a very specific piece of the larger PeopleSoft CRM environment. Apex IT technical consultants are available to help clients increase the performance of:

- The supporting network
- The database
- The operating system
- The CRM application

On-Demand Subject Matter Expertise

This is essentially a “subject matter expert on demand” service for companies that lack the resources or subject matter expertise needed to execute specific activities within the CRM initiative lifecycle. We have the subject matter experts on staff to fill in any internal client resource gaps. Whether it’s project management assistance for a full-blown application implementation, advice on functional area best practices or technical integration assistance for a PeopleSoft CRM upgrade, Apex IT can provide “battle-tested” consulting services, typically on a part-time basis, that add tremendous value in a short timeframe.

Managed Services

Targeted for clients that have already implemented and gone live with their CRM application, Apex IT managed services serve as the proverbial “ounce of prevention.” We know from experience that unless a company has proven CRM subject matter experts on staff, and resources that are able to monitor and evaluate the CRM application on a consistent and frequent basis, they are going to have to pay a third-party contractor or consultancy at some point to handle the technical and functional problems that are sure to arise. It’s not a question of “if,” but one of “when.”

Apex IT managed services flip the typical post-implementation maintenance paradigm. Rather than responding reactively to technical problems and the release of patches from the software manufacturer, Apex IT—for a nominal fee—will proactively monitor and evaluate the new CRM application to prevent technical problems and identify and apply appropriate software patches. A managed services contract amounts to an extended CRM implementation (not product) warranty, a relatively small capital expenditure that pays for itself over time.