

"It's What You Don't Know That Can Hurt You"ä



www.vineyardsoft.com

Business Activity Monitoring



Case Study



Q: How important do you think Business Activity Monitoring is to the success of a company like Administaff?

Answer: Because my department's primary focus is on improving our sales process, we felt that a system like KnowledgeSync would have a tremendous impact on our sales organization. We needed a way to keep our sales force apprised of critical business situations.

Q: Can you provide an example of an business activity event?

Sure. One significant way KnowledgeSync benefits Administaff is by alerting our sales consultants when a new lead comes in. Most of our leads come though a call center located at our Kingwood campus; the records are then created for our sales consultants around the country. In the past, it was between 24 and 48 hours before a sales consultant was made aware of the lead and that delay hampered our sales efforts. With KnowledgeSync, our consultants can now respond to these leads immediately.

Another scenario pertains to cities where Administaff has multiple sales offices. Sometimes when one office is working on a lead we receive an Internet lead from another person within the same company, but that person doesn't use the exact same

"KnowledgeSync is our invisible worker . . . we were able to implement it easily and get our return on investment almost immediately."

*Lori Haynes.
Administaff.*

company name; as a result, the lead is assigned to another office.

With KnowledgeSync, all offices are immediately notified about new leads and can use their CRM application to check that record against potential duplicates before a sales consultant has a chance to make that first phone call.

This allows our offices to see that a lead already belongs to someone else, and avoids any possible confusion or duplication of effort.

Q: What applications are you using KnowledgeSync with, and what are your plans for the future?

Right now we are using KnowledgeSync with GoldMine

Who is Administaff?

<http://www.administaff.com>

Administaff is the nation's leading Professional Employer Organization (PEO) and has been helping businesses for more than 15 years.

Administaff provides high-performance human resource solutions and administrative relief for busy entrepreneurs and managers who want to spend more time achieving their goals and less time on employer obligations.

The Challenge:

Administaff's challenge was to identify a solution that would provide them with a competitive edge in dynamically identifying and distributing critical business information to their employees.

KnowledgeSync 2000 was selected as Administaff's answer to this challenge.

The Interviewee:

Lori Haynes, Director of Marketing Research & Automation, Administaff

only, but we are looking at the possibility of tying KnowledgeSync into our proprietary software for the PEO industry. Also, we're talking with our Client Service group to explore what KnowledgeSync can do for them.

Q: Can you give me a little background on your use of GoldMine?

We started with GoldMine in the fall of 1995 and rolled it out to our district offices shortly thereafter. In 1998 we automated our entire sales force. We currently have 250+ sales consultants using the application and over 140,000 records in the database.

Q: Can you describe your experience with the use of KnowledgeSync?

I was personally able to set up everything that we needed in KnowledgeSync. Although I wouldn't expect a casual user of an application to be able to fully configure KnowledgeSync, someone with an understanding of an application's database schema should have no trouble setting up KnowledgeSync. It's also helpful to have a general knowledge of what a query is, but for someone like me who is not a heavy query developer, it was fairly easy.

Q: So would someone like yourself, typically the administrator for a product like GoldMine, be able to set up KnowledgeSync?

Yes, they would.

Q: What do you think of the "cost-to-value" ratio of KnowledgeSync, in terms of comparing what you paid

for KnowledgeSync to the value that you have received from it?

I probably shouldn't tell you this, but I think you have under-priced the product. It's amazing – the low cost for what it brings. We got our return on our investment immediately.

Q: So what's your favorite thing about KnowledgeSync?

I think that it's the idea of having an "invisible worker." If we didn't have KnowledgeSync, it would be the sole responsibility of a worker to do nothing other than monitor client data and go around and tap people on the shoulder to remind them of what they should or shouldn't be doing. KnowledgeSync takes the place of a person who would be going through all the different client files and paperwork looking for information to pass on to our people.

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Q: If you were to speak with a company reviewing KnowledgeSync for their own business, what would you say?

I'd tell them that the key thing about KnowledgeSync for us was that we were able to purchase and implement it almost immediately. If we had gone with another business activity monitoring solution, we probably would have been looking at months for implementation, plus an exorbitant cost before we even got anything implemented. And, if we had wanted to add on additional events, the cost

involved would just have grown from there.

With KnowledgeSync, there was the initial cost – and that was all. There were no hidden costs, and we could get immediate value from it. With our sales organization, when we want something, we want it now. And when our management sees it, they want it implemented today. KnowledgeSync met those needs.

Q: Can you give me an idea of how it was to work with your KnowledgeSync Business Solution Provider, Harris Technology?

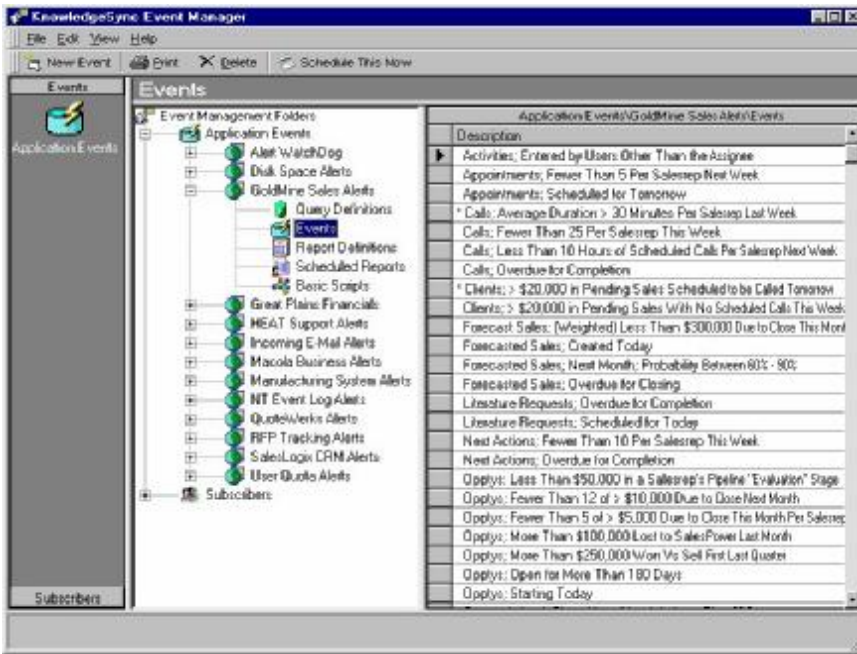
Harris has been working with us since earlier this year. They've brought us solutions without even being our solution partner. They have been absolutely patient, faithful, and incredibly knowledgeable. Working with an organization that is both knowledgeable and gets us a quick response has been a tremendous benefit to us.

And the fact that they were willing to answer questions and assist us with our projects prior to being formally engaged says something very special about their service and the culture of their company.

Q: Was it Harris Technology who first introduced you to KnowledgeSync?

Yes – in fact, I don't know if Ron Harris will remember the meeting we were in when he first started describing the different types of things that KnowledgeSync could do for us, but my eyes lit up and I just said "I want it – and I want it today."

Q: KnowledgeSync is a relatively new product in the software industry (it was



KnowledgeSync Event Manager: Sample GoldMine Alert Events

introduced in 1999). As it is now beginning to get more widespread notice amongst users, what is your impression regarding KnowledgeSync's maturity as a product?

The one thing that I found with KnowledgeSync is that there were very few bugs. In fact, there may have been **one**. In comparison, other new products that we have tested in the past came with so many bugs that we hesitated to ever buy a new product and always waited around for a new version to be released.

But we didn't find that at all with KnowledgeSync; it has been a very solid product from the very start.

Q: Anything else to add?

I test a lot of software and take a look at a lot of different products that are out on the market. And I can say that KnowledgeSync is one of the few that I got tremendously excited about.

It started in the beginning when I found out all the things KnowledgeSync could do for us, and continued once we started implementing it and seeing how

quickly we got it to work.

(Like when we watched it send out 30 e-mail alerts all at once, to all our offices across the country.) It was really exciting for us, and "excitement" and "software" rarely go together!

Other Customer Comments

"For a competitive advantage, KnowledgeSync is the difference. No matter where critical data resides, KnowledgeSync can identify it and respond to it in a uniquely timely and intelligent manner."

David Tinjum, CEO, CustomerFX

"KnowledgeSync is an ideal fit for clients who are looking to expand their awareness of critical customer issues and opportunities."

Steve Chipman, President, Lexnet Consulting

"KnowledgeSync's pre-configured events gives clients a fully-configured suite of business scenarios that they can implement and get up-and-running right away."

Clifford Hall, CEO Cortekx Consulting

KnowledgeSync Clients Monitor Conditions in Such Applications As:

- ACT!
- AdaptCRM
- AssetDesk
- BusinessWorks
- GoldMine
- Great Plains
- HEAT
- Macola
- MAS90
- Maximizer
- Navision
- PowerCerv
- Pragmatech
- QuoteWerks
- QwikQuote
- SalesLogix
- Sage Enterprise
- Sant
- Solomon
- SupportDesk