



# Efficiency

*A Brief Overview*



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**AVA SYSTEMS PTY LTD**

# *EFFICIENCY – Total Client & Business Management*

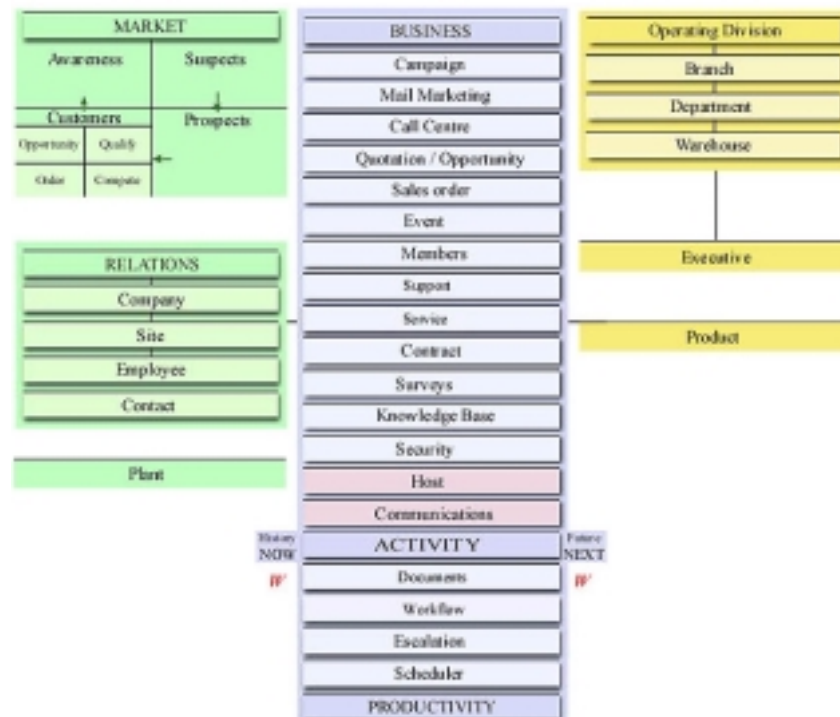
EFFICIENCY's suite of client and business management software modules can be used independently or integrated to act as the complete front-end of your business.

Automated and linked to all key business functions, based on a single database platform and integrated with existing or future financial, office and communication systems, EFFICIENCY provides an up-to-the-minute snapshot view of all activities associated with a client, product or company.

Developed since 1987, EFFICIENCY addresses the needs of entire corporations through 8 strategically designed packages built from 22 complete modules.

- Basic CRM
- Campaign and Marketing
- Sales Force Automation
- Call Centre
- Customer Support and Service
- Knowledge Base
- Event Management
- Membership
- Host Link
- Advanced Security
- Development Kit
- Reports

## Total Client and Business Management Solutions



## *CRM & Beyond*

EFFICIENCY goes much further than standard Customer Relationship Management systems. Let us tell you why...

Business is a term used for activities performed by organisations to provide products and services to its market with **efficiency** to create a profitable organisation and benefit customers.

If the "Where, What, Why and How..." analysis is applied to any business, the entire business concept can be group into these general components:

### Financial, Office and Communication Systems

- Office and Communication tools
- Manufacturing and tools
- Core Financials (Cost and Profit)

### Organisation

- Organisation
- Employees (Executives)
- Products and Services
- Know How

### Market and Customers

- Market (Including Prospects, Suppliers, Contacts)
- Customers

### Business Transactions

- Internal Transactions
- External Transactions

### Objectives

- EFFICIENCY, Benefit, Satisfaction

EFFICIENCY is designed to meet the **Objectives** by managing **Organisation, Market, Customer and Transaction** components of any business as a single source, seamlessly integrated to core **Financial, Office and Communication systems**.

EFFICIENCY provides the tools to access and manage your business from a customer-centric angle and a business-centric one acting as the front end of your core financial systems (TOTAL BUSINESS MANAGEMENT).

EFFICIENCY provides the methods and tools to access and manage your business from a customer-centric angle (TOTAL CLIENT MANAGEMENT) as well as from a business-centric one acting as the front end of your core financial and manufacturing systems (TOTAL BUSINESS MANAGEMENT). These two approaches are presented as a single and unified concept.

At last count, there were about 2000 CRM systems in the marketplace; most appeared since 1998 as part or a result of the "dot com" hysteria. Older software systems, mostly simple contact managers or specialised applications such as call centre, service, maintenance, membership management, have claimed to be CRM systems after undertaking small face lifts provided with the windows and SQL database developments. More recent and focused CRM vendors with large capitalisation and globalisation objectives are charging totally inflated fees for their services.

It's well documented that approximately 60 per cent of CRM projects fail; there are many reasons. One is a typical CRM system is no more than a contact manager front-

end and data integrator for too many other systems focusing mostly the customer side of business and fails to improve other business components. Usually, excessive project and re-invention of the business is required as external consultants rather than the authors of the software implement most of the CRM systems. A truly successful and beneficial CRM system can still be obtained by the larger enterprises with large sums of budgets to spare.

EFFICIENCY has incorporated Customer Relations Management (CRM) concepts since 1988. However, unlike most CRM systems, it maintains and executes its own data and functions before feeding processed information into financial systems, especially the components of the business other than the customer related ones. EFFICIENCY's objective is to increase the efficiency and productivity of enterprises at all levels. Its holistic, hands-on and ready-to-operate configuration immediately lowers implementation and consultancy costs and the cost of the customisations and system adjustments.

EFFICIENCY's parameter driven programming and database objects, make customisation and implementation changes quick and simple without any programming requirements. 15 years strong, continuously enhanced to maintain an edge on current technology and business requirements, if we have to follow the market trends and refer EFFICIENCY as CRM, it may have to be re-defined as **CRM ON STEROIDS**.

## *Client & Contact Management*

EFFICIENCY maintains a multi-tier, multi-purpose contact and client management module, in any form and capacity, as part of its TOTAL BUSINESS and CLIENT MANAGEMENT concept. This provides a single view of contacts, suppliers, service providers, clients (in fact the entire external world to your business) including the relations, sales, marketing, client service and any other interactions individual, organisation and corporate levels.

Enter the enterprises contact and organisational data once; it's then filtered through a powerful de-duplication process. EFFICIENCY automatically assigns the contact and organisation structure to operating divisions as required.

EFFICIENCY maintains all the user defined multi tier relations as well as the family relations and instant access to any related contact or organisation from any contact and activity points.

Each contact and organisational data can include an unlimited user defined fields, transaction lines, audio, video and graphics information.

## Executive Management

Executive module maintains each executives private and employment details as well as availability calendar, job skills and training information. Each executive record can include an unlimited user defined fields and transaction lines. This extends the executive module to a mini human resources package. Executives belong to at least one operating division, executive group, security access group, and executive team.

Each EFFICIENCY activity registers the executive that performed the transaction as well as the activity's follow-up executive. Any module record, such as Quotations, Orders, Events, Customer Service Log or Transaction, Workflow or To Do Lists always belong to at least one executive. Standard activities or workflow events incomplete by a deadline escalate automatically to nominated supervisors. The mode of receiving the data by these executives is defined at executive levels.

Executive Management delivers a powerful single view of all executive activities, Key Performance Indicators and Actuals against Budget targets. The powerful reporting and analysis tools enables users to identify analyse and manage every type of executive activity.

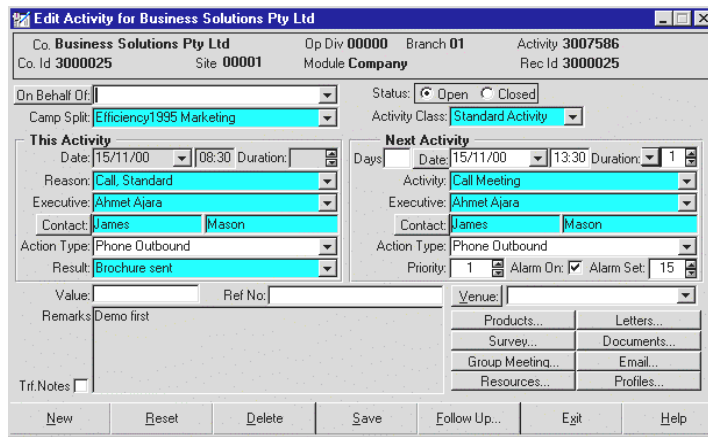
## Activity Management

Executives (employees, franchisees or volunteers) conduct business by performing activities such as customer contact, quotations, recording orders, and customer support. Activity Manager communicates with every other EFFICIENCY module making it the heart of the total business and client management system.

Activity manager creates and manages activity transactions (the 'foot print' of business relations), relating to that activity. Each Activity transaction belonging to executives, customers and contacts is date; time or alarm stamped and details relevant information, letters, e-mails and documents.

Activity Manager can be extended to unlimited tiers of case management information to capture and resolve the case. Any information – i.e. transactional or static – can be captured and reported for many types of user-defined services.

Activity Manager also incorporates an extensive Task Assignment, Scheduling, Escalation, Resource and Venue Booking and Workflow functionality.

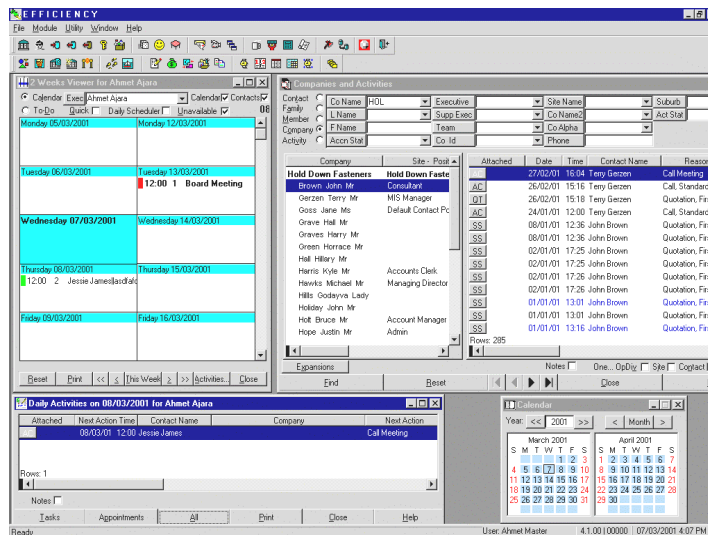


## Scheduling

While Activity Manager integrates and organises business activities and tasks. Activities without time specifics are categorised as tasks and those with time and durations are treated as appointments.

Appointments are displayed in daily, weekly, monthly, and yearly calendar or in grid formats. The "days not available" for business can be maintained on multi-levels, from individuals to countries for various reasons. Group meetings can also be organised, resourced, re-scheduled, re-assigned and re-organised.

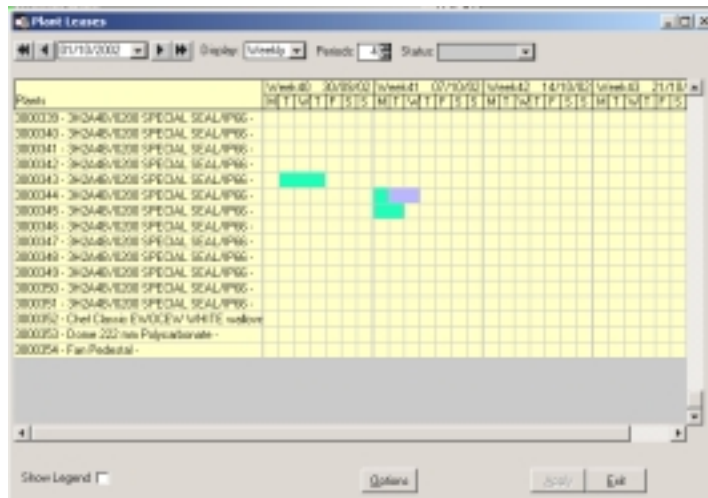
Each activity is time stamped both at creation and completion, and the date and time of the next action recorded. EFFICIENCY synchronises with MS Outlook, Lotus Notes and GroupWise schedulers, calendar details are automatically updated, and any changes in them are reflected in EFFICIENCY scheduler thanks to Task Manager.



Not only scheduling the customer or employee related operations EFFICIENCY provides a powerful scheduling module for the Plants, Resources and Venues.

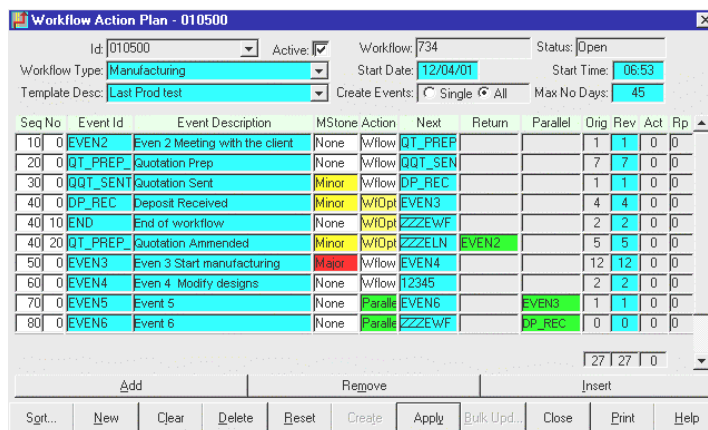
As part of its Venue Management within the Events Management Module and Booking and Leasing as part of the Plant Management Module the entire booking management is provided as part of the EFFICIENCY Scheduling concept.

The multi level Grid display is one of the many different forms of displaying and accessing the scheduling and booking data available in EFFICIENCY.



## Workflow

Activity Manager can create supporting workflow templates and action plans to forecasted events or projects. "Action Plan" is creating future Activity Transactions from the pre-designed "Workflow" event templates to manage activities as they occur. Event definitions are prepared as individual events with appropriate business rules and activity defaults already attached them. In the Workflow Template, events can be assigned action types to determine how they are joined together.



EFFICIENCY provides 3 standard levels and types of Workflow models.

- To Do List:** A template driven multiple To Do lists can be attached to any record and are maintained fully at each task/action officer level for the related tasks.
- Action List:** This model is only available at the Customer Request Centre to assign various predetermined tasks to various executives based on the Major Subject – Minor Subject and Task combinations. Although each task is fully detailed as who is the responsible person, what are the priorities, what communication methods are required etc this method is usually used for simple and easy to fulfil tasks.
- Workflow:** A powerful workflow engine is designed to run multiple tasks at multiple levels and multiple tiers by different internal and external parties (executives) and to perform almost unlimited variations of functions at each level including updating the third party databases and creating automated communications in conjunction with the EFFICIENCY Task Manager.

Multiple workflows can be assigned to a contact, organisation or customer request from the predefined templates, modified as required and become the Action Plan.

# Campaign and Marketing

## Campaign Management

Campaign Management enables organisations to maximise the value of every B2C and B2B relationship. EFFICIENCY Campaign Management enables better psycho- and demo- graphic customer segment profiles as each call, mail shot, order, quotation and sales record within each campaign are recorded as an Activity history record.

There is flexibility to create unlimited campaigns with market definitions, media details, marketed products, and product groups in detail. Accumulate estimated and actual campaign costs are against a limitless number of cost categories and allow for increased financial control.

EFFICIENCY facilitates high-level management control as estimated and actual results are accumulated under related campaigns ensuring future campaigns are based on successful past strategies. Full campaign review using analytic and reporting capabilities enable the measurement of marketing endeavours.

## Mail Marketing

Mail Marketing Management provides a most effective way of sending information to your existing customers, clients, prospects and suppliers by bulk mail or bulk e-mail not only for the Campaign and Marketing tasks but also for any other requirements. Your marketing operations will be streamlined with improved work practices and profitability.

Mail Desk allows you to automate and reorganise repetitive tasks, including targeting, call scheduling, scripting, request or order fulfilment, mail merging, recording response, reporting, generating proposals and bids, and entering orders.

EFFICIENCY will create, merge, cleanse and maintain mail lists for bulk mail-out. Mail Desk can be integrated with all major office packages on-line.

The e-mail lists can be activated as a Task Manager function thus creating a fully automated and analysed campaigns.

## *Document Management*

EFFICIENCY's Document Management is the most effective way of issuing customers, clients, and prospects with documents, manuals, brochures, contracts, and promotional material.

The ability to execute and analyse static, transactional, audio, video and graphical documents in real time so that comprehensive information is available across departments. Document distribution records, captured as an Activity, enable better customer service and increased marketing and sales opportunities.

The screenshot displays a software window titled "Document" with a sub-tab "Document 1" and "Catalogue 2". The form contains the following fields and sections:

- Document ID:** CAS\_EFF\_SUP\_01
- Description:** Customer Support Case Study - Making e
- Last Revision:** (empty)
- Size:** 100 Unit: each
- Store Location:** Printing Room Bin: A4.16
- Issue Date:** (empty) Valid Unit: (empty)
- Directory Path:** (empty)
- Supplier Information:**
  - Name: AVA Systems Pty Ltd
  - Reference: AV123.2345
  - Quantity: 1000 Unit: each
  - Alternative: (empty)
- Status:** Active Document
- Campaign Split:** Default Campaign Split
- Category:** Case Studies
- Type:** Printed material
- Op Division:** Efficiency Operations
- Quantities:**
  - On Hand: 445.00 On Order: 1,000.00
  - Dispatched: 375.00
  - Received: (empty) Expected: 1,000
- Remarks:** Use this print for customer support quotations and presentations. It may not be used after the New year.

At the bottom of the window, there is a toolbar with buttons: Search, Clear, New, Reset, Delete, Detail, Save, Exit, and Help.

Document Management can maintain the records of any type of documents and promotional materials used organisation-wide. It also keeps supplier, cost, and stock information for each document, brochure, and literature.

# Sales Force Automation

## Product Management

Storage and analysis of product and services data - static, transactional, audio, video or graphical – is unlimited. The Product Management system allows management to design, execute and manage even the most specific tasks such as loyalty marketing, content management, catalogue maintenance, catalogue selling, e-commerce, and subscriptions.

Set sales targets for each product and analyse up-to-minute sales, marketing, and service results campaigns, sales orders, quotations, and invoiced sales, periods and sales staff performances. Extensive cross referenced product information from vendors and ability to set a comprehensive special pricing matrix for a range of customers at campaign levels allows management to increase or maintain the target profit margins by reacting immediately to changes in customer and market demands.

Standard prices can be automatically updated from vendors as prices or exchange rates change. Recommended and minimum selling prices or gross margins can be automatically set based on specific business rules.

When EFFICIENCY is used with an Inventory Management System the Product Management module, the data in this module updates the Financial System.

## Vendor Management

Vendors supply product and services to the market place. Vendors that supply to your organisation are called 'Suppliers' and the vendors that supply to your clients and prospects are called 'Competitors'. EFFICIENCY Vendor Management Module holds all necessary information about products and services sold, marketed, and maintained by suppliers and competitors.

When EFFICIENCY is used with a financial system, the data in this module can be updated from corresponding tables of the Accounts Payable module. The update may be performed at regular intervals as a Batch update or instantly via live link.

## *Quotations & Opportunity Management*

EFFICIENCY Quotation and Opportunity Management operates stand-alone or connected to existing financial systems. Data is automatically transferred to EFFICIENCY Sales Order system and can then be transferred to the financial system and all related modules are usually updated in real time as dictated by business rules.

Each quotation entered directly or via e-commerce creates an activity transaction for the customer, contact and the executive stamped with the follow up and sales cycle details.

Multi-tier and multi purpose special pricing function automatically calculates the selling price and applies to the line item. Access or alteration of the minimum selling price, cost, and standard price are protected at user levels.

## *Sales Order Management*

EFFICIENCY Sales Orders Management operates stand-alone or connected to existing financial systems. Data can then be transferred to the financial system and all related modules are usually updated in real time as dictated by business rules.

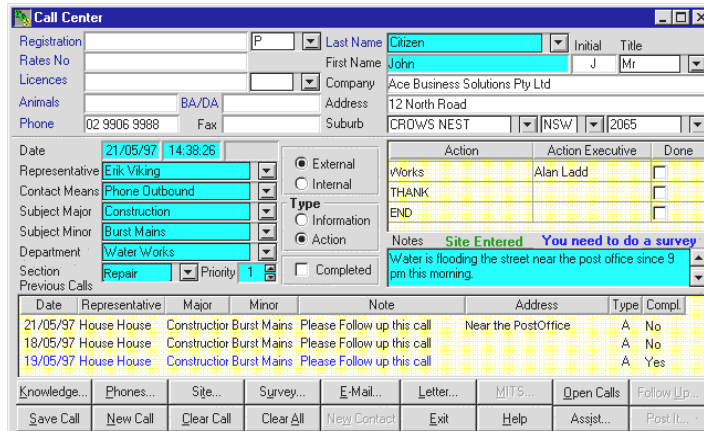
Each sales order entered directly or via e-commerce creates an activity transaction for the customer, contact and the executive stamped with the follow up and sales cycle details.

Multi-tier and multi purpose special pricing function automatically calculates the selling price and applies to the line item.

# Call Centres

## Call Centre

EFFICIENCY Call Centre creates and maintains all an entire organisations inbound and outbound calls, tele -marketing and -sales activities. During call centre activities, a single contact view comes from every interaction point. EFFICIENCY handles all call centre functions from a single screen thanks to sophisticated programming techniques.



Date	Representative	Major	Minor	Note	Address	Type	Compl.
21/05/97	House House	Construction	Burst Mains	Please Follow up this call	Near the PostOffice	A	No
18/05/97	House House	Construction	Burst Mains	Please Follow up this call		A	No
13/05/97	House House	Construction	Burst Mains	Please Follow up this call		A	Yes

EFFICIENCY Call Centre module provides many very specific functions for specific organisations. For Example:

- **Fundraising**

Most non-profit organisations raise funds in the form of pledges, donations, bequests, selling raffles, and lotteries. Most functions require some form of "Bulk Contact"; EFFICIENCY handles this within the call centre Module. Activity Manager records activities and stamps them with the appropriate Campaign Split. Receive payments in any form, letters and receipts are printed or e-mailed, banking is processed, and results transferred to financial systems.

Advanced campaign and marketing functions improves organisational citizenship by providing donors and prospects with appropriate information in time and by their choice of communication medium.

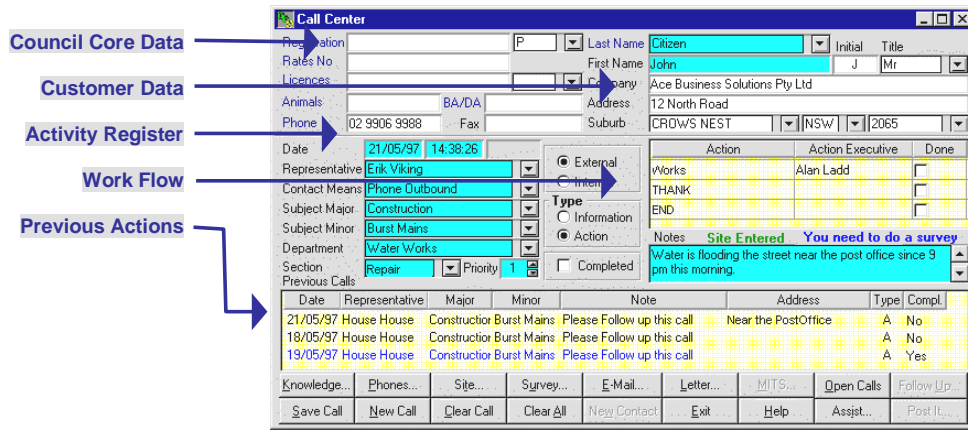
Produce lottery tickets, for distribution via volunteers or reseller channels. Each raffle and lottery can have multiple prizes and the system draws the winning tickets on the draw date.

- **Customer Request Management**

Most of the service based organisations such as councils; welfare organisations can benefit the Customer Request Management functions of the EFFICIENCY's Call Centre Module. For example, the entire Local Government Customer Contact and Request functions can be maintained on a single screen.

EFFICIENCY allows the operator to search and access the data from the EFFICIENCY or all the other ODBC compliant local databases using the on line search techniques.

The contact data can be searched via the screen or Search Engine window and is searchable and to locate the data by user defined criteria.



For example in the case of the Local Council application any one or more of the Council's nominated data such as

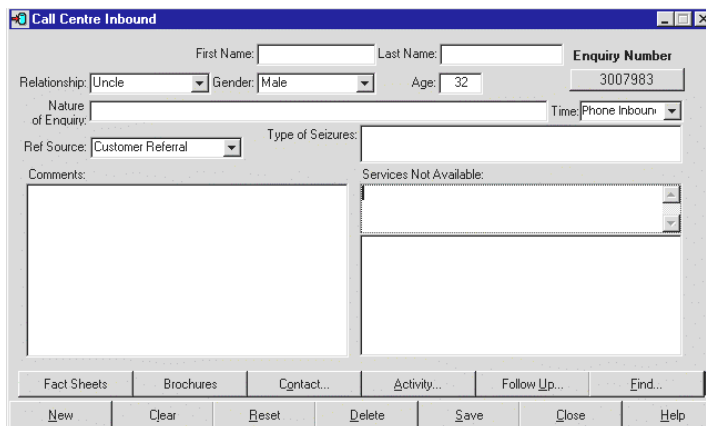
- Infringement, Assessment rates
- Licences (various)
- Animal Registration
- BA and DA Applications
- Financial Details
- Work Orders
- Property, Building
- Etc...

Can be accessed instantly and can be used or linked to the current customer request.

When a customer record is located all related data is available to the user with compliance to security and business rules

▪ **Case Management**

The Inbound Call Centre objects are customisable for the exact requirements of the Case Managements.



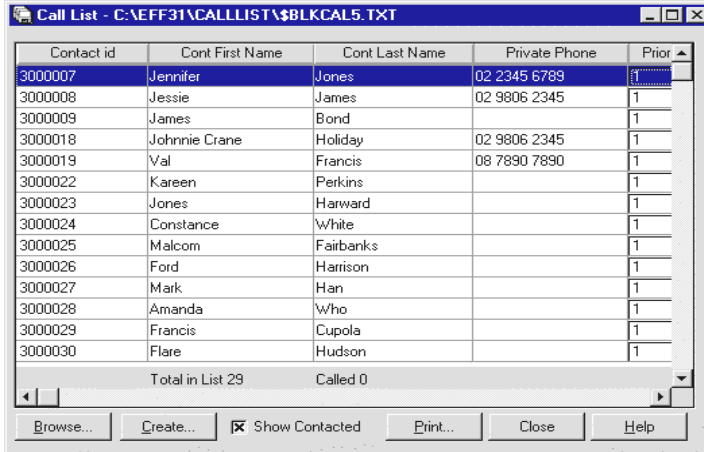
The calls from the regular clients as well as from the anonymous calls can be recorded, responded, and resolved.

Each call can be assigned to another officer to take the required further actions as well as creating the regular follow-ups with the clients.

## Call Guide Lists

The Data Dictionaries and Views are used to create 'Call Guide Lists'.

Simply creating and assigning the list to an operator enables the user to become an Outbound Call Centre Operator with a sophisticated call guide list driving the entire call function.



Call List - C:\EFF31\CALLLIST\BLKCAL5.TXT

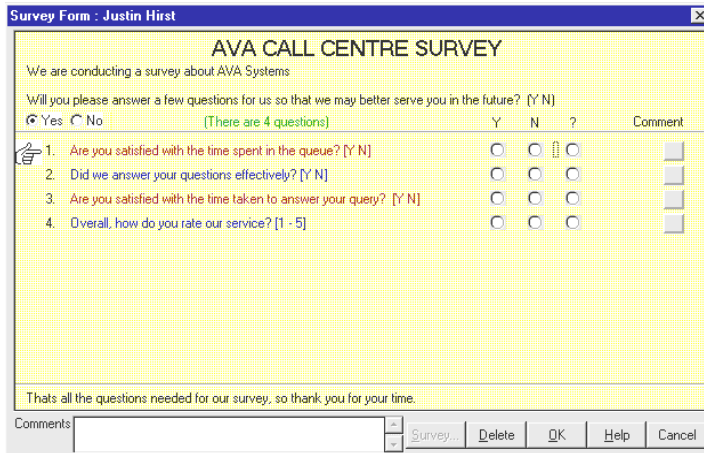
Contact id	Cont First Name	Cont Last Name	Private Phone	Prior
3000007	Jennifer	Jones	02 2345 6789	1
3000008	Jessie	James	02 9806 2345	1
3000009	James	Bond		1
3000018	Johnnie Crane	Holiday	02 9806 2345	1
3000019	Val	Francis	08 7890 7890	1
3000022	Kareen	Perkins		1
3000023	Jones	Harward		1
3000024	Constance	White		1
3000025	Malcom	Fairbanks		1
3000026	Ford	Harrison		1
3000027	Mark	Han		1
3000028	Amanda	Who		1
3000029	Francis	Cupola		1
3000030	Flare	Hudson		1

Total in List 29      Called 0

Browse...   Create...    Show Contacted   Print...   Close   Help

## Questionnaire & Surveys

EFFICIENCY users can include any type of questions under a Questionnaire Header record. These questionnaires can be used as standalone customer satisfaction surveys at any time and occasions or can be automatically initiated at the Customer Request Centre as an extension of the customer request capture process. Questionnaires can be assigned to Major Subject, Minor Subject, and Action or can be selected from the list of questionnaires.



Survey Form : Justin Hirst

**AVA CALL CENTRE SURVEY**

We are conducting a survey about AVA Systems

Will you please answer a few questions for us so that we may better serve you in the future? [Y N]

Yes    No   (There are 4 questions)   Y   N   ?   Comment

1. Are you satisfied with the time spent in the queue? [Y N]    Y    N    ?
2. Did we answer your questions effectively? [Y N]    Y    N    ?
3. Are you satisfied with the time taken to answer your query? [Y N]    Y    N    ?
4. Overall, how do you rate our service? [1 - 5]    1    2    3    4    5

That's all the questions needed for our survey, so thank you for your time.

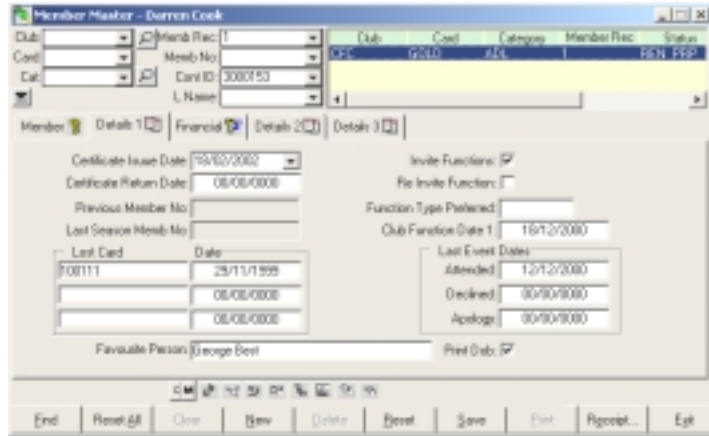
Comments:    Survey...   Delete   OK   Help   Cancel

# Membership Management

## Membership Management

EFFICIENCY treats members as an extension of the contact and client management modules. This structure automatically paints a larger membership picture in EFFICIENCY.

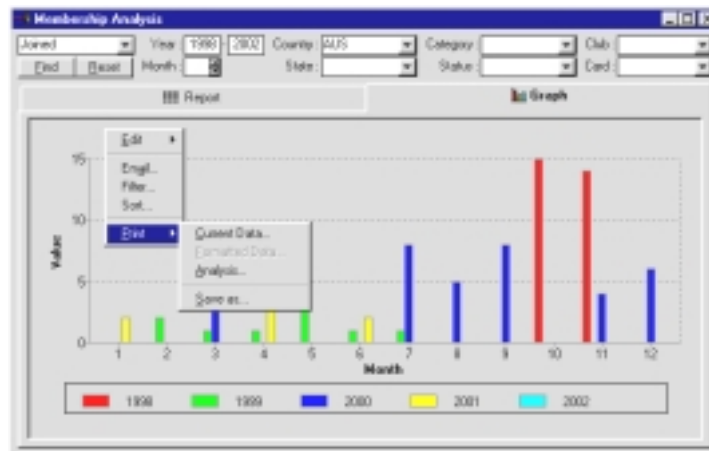
Users can maintain multiple clubs, cards, categories and membership types contacts, families, groups and organisations as well as sponsors as part of information structure.



EFFICIENCY sales, marketing, and service functions are integrated to the membership system. Each membership activity is attached to a Campaign Split; therefore, your marketing department will have full knowledge of members in real time.

Reserved seating, parking, and lockers can be maintained on multiple levels and venues. An unlimited number of Clubs, Card types and Member categories can be created for any required combinations.

Instant access to MIS specific to the membership module allows the snapshot information for the status of the membership.



# Event and Venue Management

## Event and Venue Management

Event Management manages all aspects of events and venues. EFFICIENCY automatically produces guest lists and invitations or by selection criteria.

The RSVP maintenance allows users to enter acceptance, apology, or cancellation of attendance, and produces comprehensive guest lists and name tags. Guests can be individuals, members or their quests, corporations and their staffs or the combinations of these.

Event payments can be received at various charge levels and loyalty points can be applied to events at sub events levels. The events item costs are accumulated and totals are transferred to your organisations financial applications.

Multiple To Do Lists for each event can be prepared to maintain the check lists for a successful event and a consolidated schedule of venue and facility bookings by event and event Splits can be produced for distribution to key event staff.

The screenshot displays the 'Event Management' window with the following details:

- Event 1:** Id: NEW1, Description: New Member Lunch, Status: Open, Type: Lunch, Start: 26/03/00, End: 26/03/00, Executive: Ahmet Ajara.
- Table:**

Description	Type	Status	Start Date	End Date	Executive
Lunch	Seminar	Open	26/03/00 11:00	26/03/00 14:00	Ahmet Ajara
- Event Split 1:** Id: BEW1\_1, Start Date: 26/03/00 11:00, End Date: 26/03/00 14:00, Description: Lunch, Type: Seminar, Status: Open, Executive: Ahmet Ajara, Use Loyalty: No, Points: .
- Financials:** RSVP: 14/12/99, 17:00, Cost: 3,248.00, 17/01/01, Original Budget: 3,435.00, Capacity: 50, Sold: 2,250.00, Modified Budget: 3,581.00, 17/01/01.
- Attendance:** Booked: 122, Attended: 44.
- Buttons:** Options..., Add Split, Remove Split, Save Split, Search, Clear, New, Reset, Delete, Confirm, Details..., Save, Exit, Help.

Facility, Event, Sub Event, and Venue combinations can be booked, maintained within the Plant Management and Service-Maintenance Modules, resources allocated.

The costing, planning, and charges details are passed on to your financial system for processing and analysis.

# Customer Support and Service

## Help Desk & Customer Support, and Service & Maintenance

EFFICIENCY Help Desk and Customer Support module, a multi-tier and multi-purpose log, resolution, costing and spare parts maintenance system, performs complete internal and external Help Desk functions as well as the Maintenance module, a multi-purpose log, resolution, costing, performs Plant Maintenance.

Each support transaction is connected to other EFFICIENCY modules via Campaign Management and Activity Management, allowing the single view access of the enterprises entire customer sales, marketing, and service activities. Support and Service transactions can be recorded against product category, product or plants. Very extensive charge matrix for the service and support activities can be used. Chargeable and non-chargeable activities are recorded with the actual and calculated cost values.

The screenshot shows a software window titled "Support Desk - Log: 3000027 - Hold Down Fasteners". It is divided into three tabs: "Log 1", "Transaction 2", and "Service Parts 3". The "Log 1" tab is active and contains the following fields:

- Support ID: 3000027
- Desc: Hold Down Fasteners
- Company: 010066
- Co. Name: Hold Down Fasteners
- Site: Hold Down Fasteners
- Contact: Terry Gerzen
- Status: Active
- Priority: 1
- Opened: 09/07/98 10:36
- Closed: 00/00/00 00:00
- Branch: NSW Branch
- Contact Ph: 02 9987 1234
- E-Mail: terryg@holddown.docm.au
- Support Type: Default Support Type
- Chargeable:
- Completion Requested: 09/07/98 00:00
- Days Over: -1004
- Follow Up Time & Exec: 09/07/98 00:00
- Action Exec: Ahmet Ajara
- Print Doc: [empty]
- Op Division: Efficiency Operations

At the bottom of the window, there are buttons for Search, Clear, New, Reset, Delete, Print, Detail, Save, Exit, and Help.

The confirmation of the log can be e-mailed to the client and the details can be emailed to the support or service officer.

## Plant Management

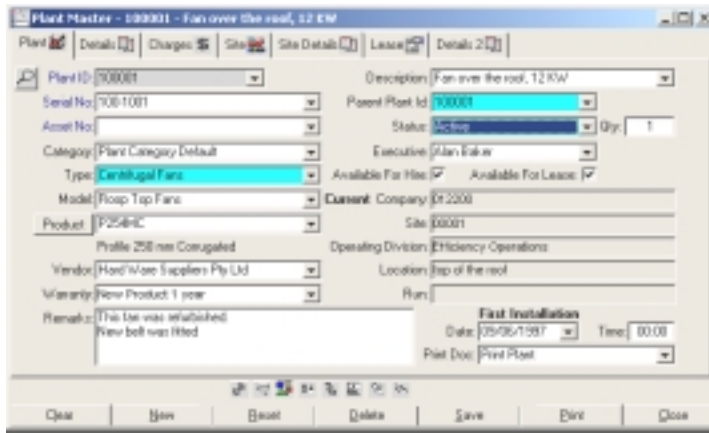
Plant is a general term used for products, equipment, machinery and customer assets, either individual or groups of items, owned or used by customers but maintained and serviced by your organisation. Reliable, economical and safe operation of a Plant equates a satisfied and loyal customer.

Most service and maintenance functions in financial, ERP and even specialised service systems include the Plant as merely an object to be serviced with a serial number, description and a few dates and values. Almost all of them lack single view access to customer details as plants user, history, transactions, on line part information, products, suppliers, manufacturers, technical details, reports, surveys, training and service manual and analysis data etc.

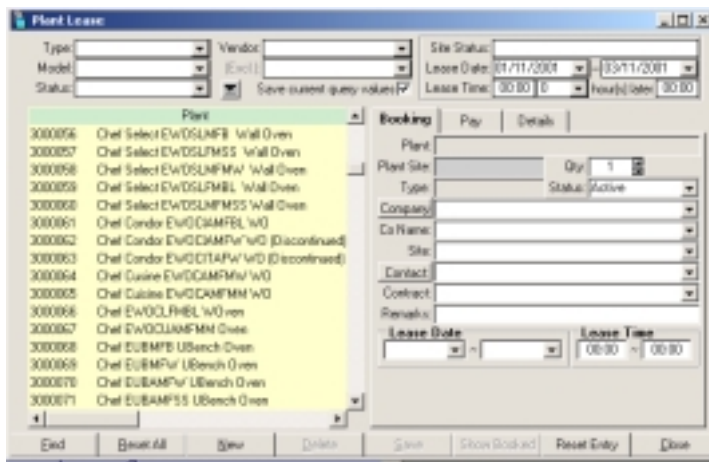
EFFICIENCY structures unlimited number of user defined attributes to each plant at a specific plant site linked with or without contract records, enabling the system to control any type of functions such a Lease Management, Fleet Management, Asset Management, Property Management etc.

The entire preventative maintenance, scheduled maintenance, plant routing, usage reports all can be maintained in the Plant Management Module.

EFFICIENCY Plant Management can operate stand-alone or integrated with existing financial systems. Typically all the operational functions are performed in EFFICIENCY and the financial data is passed on to your financial system for processing and analysis.

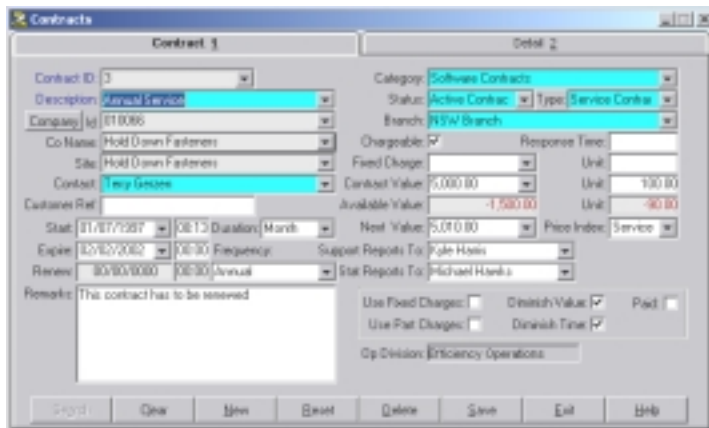


The individual or kitted plants can be hired or leased. The multi-level hire rates can be set at plant or model levels.



## Contract Management

Contract Management creates and manages contracts as an integral component of the total customer service and support function. It allows the assignment of multiple contracts to each customer site and contract can be linked to multiple plant items, while each contracts fixed or diminishing values and times used by the Support and Service activities are automatically maintained within EFFICIENCY.



Multi-tier and multi-purpose charge matrix can be set against each contract so that the most appropriate charge values are used in the Service activities. Contracts can also be set for periodic billing; the automatic billing information is then passed on to the financial applications and the contract data is automatically updated.

# Knowledge Base

EFFICIENCY provides three types of knowledge access:

1. **Operator Assistance:**

Is only available for the Customer Request Operators. Based on the selected Major and Minor Subjects an assistance window to assist the operator in call handling e.g. what information should be taken from or imparted to a customer in the circumstance is available.

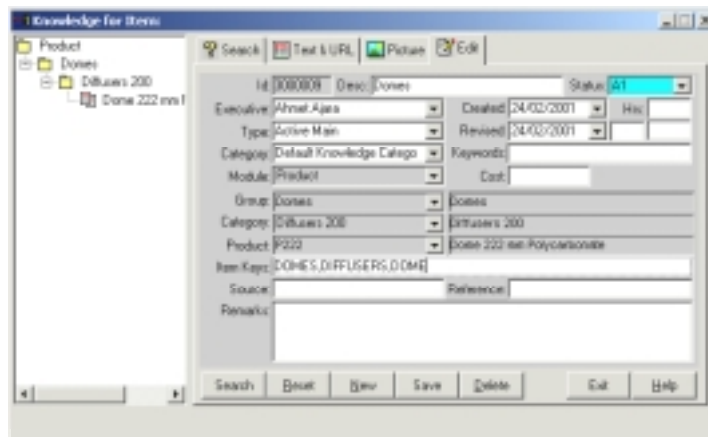
2. **The Internet or Extranet access:**

for each major and minor subject combination, a nominated access is available only for the Customer Request operators.

3. **Knowledge Base:**

EFFICIENCY Knowledge Base is a three-tier knowledge base storage and access system. This table shows typical knowledge levels:

<u>Module</u>	<u>Group</u>	<u>Category</u>	<u>Item</u>
Product	Product Group	Category	Product
Plant	Category	Model	Plant
	Fault Category	Fault	
Campaign	Category	Type	Campaign
Contract	Category	Type	Contract
Event	Category	Type	Event
Support	Major Key Type	Major Key	
	Minor Key		
Member	Club		
	Card		
	Category		
Knowledge	Category	Type	Item



The internal and external data and information can be accessed based on the user defined Group, Category, and Item structure. The information is grouped at the nominated levels of this structure.

When any one of the items of the structure is accessed, related knowledge is available by simply activating the pop up menu and selecting the knowledge from the menu.

# EFFICIENCY Features

**Business Integrator** EFFICIENCY should exceed the functional sales, marketing, and service needs of any organisation. However, it requires information flow between other business applications and EFFICIENCY to fulfil its total Client and Business Management commitment.

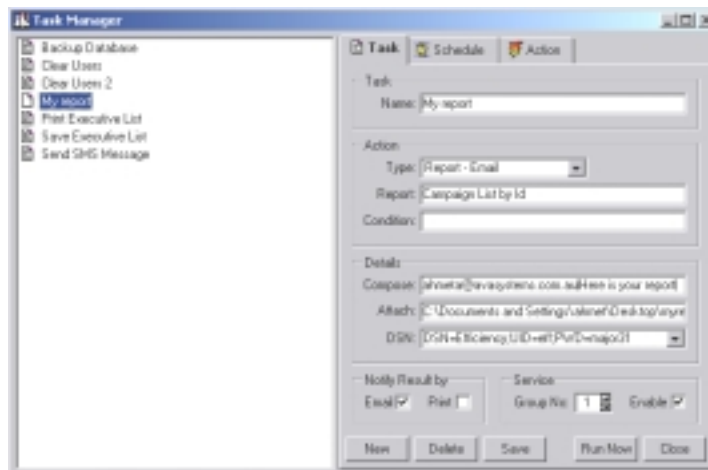
Integration with core financial, internet and e-commerce, office and communications systems and real-time data flow from the customer and prospect interaction points such as sale terminals, turnstiles, internet etc are essential parts EFFICIENCY's information infrastructure. EFFICIENCY uses Business Integration to achieve this task economically, effortlessly, and effectively. The only requirement is that financial system's database is ODBC compliant and permits external access.

## Task Manager

Task Manager integrates EFFICIENCY simply and seamlessly with other applications and information sources; it reduces costs and delivers benefits sought from advanced information infrastructures.

EFFICIENCY Task Manager monitors external databases for any changes, replicates those to another database or EFFICIENCY, creates flat files for importing into another application. Task manager also alerts relevant people of a critical event with an email notification. It updates data and schedule any possible task between multiple databases.

EFFICIENCY Task Manager allows changes made in the source application to be reflected in the destination application according to predefined rules. Integration can be in either direction: updating EFFICIENCY from another application or vice versa, updating external systems between each other or creating bi-directional communication tasks such as e-mail, sms and Internet messages.



- **Automated Communications and Marketing**

EFFICIENCY Task Manager can run scheduled multi-tier e-mail and sms campaigns, automatically close the loops, update the records, and send documents.

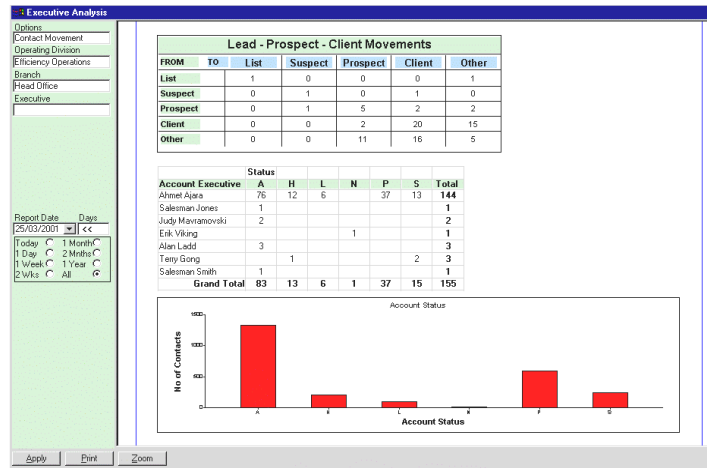
- **Implementation and Integrity Champion**

EFFICIENCY Task Manager finally puts integration firmly on the agenda for software implementation. It makes integration of various corporate applications quick and simple, and results in significant savings in resources and costs.

## Analytics

EFFICIENCY enables organisations to run reports and analyse business activities with the marketplace.

Reports such as: Actuals versus Budgets; Exceptions; Best and Worst Performers; Top 10 Quotation Customers; Business Customer Performance; and the Worst 10 Products for sales are at your finger tips and deliverable on demand. The users imagination is the only thing limiting the software's reporting and analysis capabilities.



## Report Writer

Each EFFICIENCY module includes functional reports and enquiries. The recommended report writer for EFFICIENCY is InfoMaker. InfoMaker goes further than standard reporting software allowing full access to data for reporting, querying, and form design. Once a set of forms and reports has been established, they can be bundled to create a standalone, royalty-free Windows application. Reports can be accessed from within EFFICIENCY or externally.

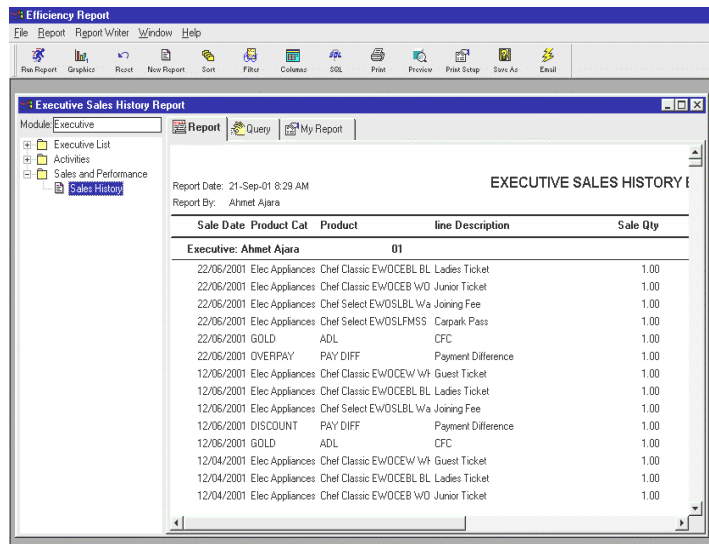
Graphs and charts can easily be integrated into OLE 2.0-compliant applications. Any report can be produced as a HTML page, ready to publish on the web, or be saved in 'PSR' report format and distributed via E-mail. Reports can be distributed without any licence restrictions.

Task Management's scheduling capabilities enables users to schedule the production of repetitive reports (such as quarterly sales by product reports). EFFICIENCY automatically saves the report in the user-preferred format or emails the reports to singular or multiple users.

## Pre-programmed Reports

In addition to existing reports provided in the system, report writer will allow the users to produce any reports in one or a combination of the following formats:

- Graphics
- Spreadsheets
- Grids
- Newspaper Columns
- Forms
- Labels
- OLE2
- HTML
- PDF



## Security

The system is embedded with an extensive security function operating at database, application, and user group level, providing system administrators with necessary resources for full data protection.

User and user groups are defined and their permissions relating to database access and the executives and executive groups controlled which then controls the functional and application permissions. The user and user groups is a control mechanism to access the data, the Executives and the Executive Groups is the control mechanism accessing to the functions and processes.

Special prices, budgets, historical data, performance analysis, scheduling, access groups etc are all related to the executives. The 'User' is merely another functional attribute of an executive.

- **Log-in Permissions**

The Database Manager and the EFFICIENCY Security Manager by the user ID and password control login permission to the database jointly. This information can be cryptic, hidden or accessed through a Firewall.

- **Functional Permissions**

Executives and Executive Groups can be attributed to various Access Groups, which in turn are assigned to data such as client transactions, quotations, orders etc. The Executives can only access data with the matching Access Groups. This allows the segmentation of the data horizontally so that it can only be accessed by a selected group of executives. Executives can have limited access to certain functions such as limitations on cost prices, transactions of the other executives; limitations on the maximum quotation values, or minimum sell prices etc.

## DPID, PAF & Barcode Functions

EFFICIENCY's Delivery Point Identifier (DPID) and Barcode Printing features optional and an additional license fee is payable. Sub-licensing from a selected AMAS approved software vendor enables this. DPID and Barcodes options include barcode font, allowing EFFICIENCY users to print barcodes in-house.

The DPID matches EFFICIENCY addresses against the PAF and every matched address in EFFICIENCY database is assigned a DPID, enabling barcode creation. It also amends address records, obtaining an exact match with the addresses contained an Australia Post developed database known as the Postal Address File (PAF).

The PAF contains 9.5 million physical delivery points across Australia. It then assigns a DPID to each delivery point. This assists to maximise bar-coded lodgement volumes and reduce postage costs.

Additionally, additional information can be added to the barcode using a 52-bar or 67-bar customer barcode e.g. customer reference and membership numbers, customer segment or type, mail piece reference numbers etc. These additional features will be included in EFFICIENCY in the future releases.

## *Communications Link*

EFFICIENCY links to most standard office and communication systems and databases. The Task Manager can be used to expand the following functionality, which is provided as in built options:

- **Email**

EFFICIENCY supports MS Outlook, MS Exchange, GroupWise and Lotus Notes email systems. Email messages are sent directly from EFFICIENCY with or without attachments. Each email is recorded in Activity Manager as part of the total client management concept. Task Manager can record incoming email messages in Activity Manager and send bulk email campaigns.

- **Scheduler and Office Products**

EFFICIENCY scheduler can be linked to MS Outlook, GroupWise and Lotus Notes. EFFICIENCY is linked to most MS Office products especially MS Word and MS Excel. MS Word is used for the single and multi mail handling and mail merge functions. Any other office products are accessed via OLE integration.

- **Telephony**

Telephony functions such as direct dialling and caller ID recognition are supported via TAPI interface.

- **Data Replication**

EFFICIENCY supports multi-tier data replication between the various EFFICIENCY databases in the enterprise. The extent and the functionality of the replication may vary from one database vendor to another.

- **Proxy Data Sharing**

EFFICIENCY supports the proxy data sharing between EFFICIENCY and other applications using proxy tables.

- **Web Access**

Most EFFICIENCY functions accessible via Internet through your website. Customer details, quotations, orders, appointments, event booking, price enquiries, transaction enquiries and much more can be accessed using these objects.

The available WEB access groups, each contain many access functions to related EFFICIENCY modules, are:

- Contact and Activity Management
- Membership
- Event Management
- Sales Force Automation
- Event Management
- Service and Maintenance

# *Technical Requirements Summary*

EFFICIENCY Total Client Management system was developed on the PowerBuilder platform as a client server application to run on Client PC's with the following specifications:

- Pentium 550+ (Lower spec for Winframe or Terminal Server Environment)
- Windows 95, 2000 or NT
- 64 Mb RAM (128+ for NT)
- 100 Mb Hard Disk Space

The network operating systems can be Unix, NT, Novell, Winframe or Terminal Server. The connectivity to the clients PC's are maintained by the TCP/ IP, IPX or Netbios protocols.

## **Server Specification**

The database engine (server) can reside on the file server or on a separate database server on the network.

Server specifications are dependent on a number of factors. The EFFICIENCY database is generally not CPU intensive, and as such, CPU size and quantity is directly related to the number of users.

Minimum requirements are an entry-level PII processor. PII266

## **Memory**

As a general rule of thumb, you should allow for 20% the size of the database to be used as a database cache. Add to this the memory requirements for your operating system. Additional Memory may be required if the server is participating in File and Print sharing and or running other applications.

Minimum memory 128 Mb for an NT4 Server

## **Disk Subsystem**

Disk IO is dependent on the volume and type of transactions. The database consists of a database file and a log file. These should ideally be placed on separate disk devices and ideally away from the main operating system and swap file device.

Minimum requirements are a dual disk system. Size of disks relative to the anticipated space required. We recommend a SCSI disk subsystem for both performance and reliability.

To aid in performance and redundancy, the use of hardware RAID controllers should be considered. This is highly recommended.

## **E Mail Protocols and Third Party Software**

EFFICIENCY supports the MAPI, Notes and GroupWise for Email and Scheduler integration.

# *AVA Systems Services*

We aim to provide our consultants and customers with a framework by which they could implement and enhance EFFICIENCY as a tool to exceed customer expectations. The EIM and ECM are continually upgraded and updated based on our product extensions, as well as recent implementation experiences and best practices and are used in all implementation and change management projects.

## *Vision Management*

Businesses need to be able to monitor key performance indicators and modify business rules in an ever-changing market. In order to support this when implementing the system, key people in every part of the business should be asked what key information they need in order to achieve high business performance. Our prime objective is to support our customers' total business and client management goals. We call this Vision Management.

Vision Management is about managing changes in customer business environment during the implementation phase and results in the easy adoption to changes during the operational phase. Vision Management starts with extensive brain storming as part of the Implementation Methodology and continues throughout every phase of the Change Management project.

## *The Implementation Methodology*

EIM covers the entire implementation lifecycle from system selection through to sign-off. It encompasses all activities that may take place throughout the life of an implementation process as:

- Project Management
- SW Installation and Hardware specification
- Business Analysis and Design
- Customisation
- Customer Training
- The EFFICIENCY Solution Set up
- Validation and Testing of EFFICIENCY Solution
- Go live
- Sign Off and Project close.

One objective in providing this methodology is to ensure that the customer understands the steps needed to implement EFFICIENCY, together with the resources they will need to allocate to the project to ensure its success.

Another key objective in EFFICIENCY implementation projects is "Skills Transfer" to the customer's organisation. Success is achieved by:

- Both Project Managers and Implementation Teams understanding the customer's current situation and giving advice on what total Business and Client Management information is needed.
- Training and organising the project in such a way that the customer is able to do most of the implementation themselves.

A comprehensive range of template forms and checklists to ensure project documentation is consistent and complete in every project and to ensure adherence to the same high standards at all times supports EIM.

### **Business Analysis & Design - Brain Storming**

Our experts collaborate with the customer to understand their business, sales, marketing and customer relation's needs. This identifies and defines the appropriate structure that will meet their total business and client management and reporting

requirements. Once established, these concepts ensure the correct data is recorded, transferred or related on each transaction to allow for its' easy analysis.

Here, the customer business requirements and business processes are defined and documented. Any system integrations with EFFICIENCY is described and documented through the EFFICIENCY Business and Data Model and all the reporting requirements are defined and documented through the EFFICIENCY Business Model. Without emphasising this, the project can easily become very unstructured and it may not respond or only partly respond to the real business requirements.

### **Training the Trainers and Supervisors**

The second most important phase is **Training the Trainers and Supervisors**. The objective of this exercise is to enable the customer's Implementation Team to carry out the design and implementation of EFFICIENCY with consultancy support from the EFFICIENCY Project Team and to be able to train the day-to-day users.

Super Users receive an appropriate level of training to enable them to take responsibility for the set up of their modules, database maintenance and produce ad hoc reports.

Ultimately, implementation remains the customer's project and they determine when EFFICIENCY goes live. However, the customer must always get quality guidance and feedback from our Project Team to ensure the project meets the schedule and expectations.

We provide a range of training, consultancy, and installation services to assist the customer in this process.

## ***EFFICIENCY Change Management***

ECM covers the entire EFFICIENCY lifecycle from the implementation project sign off onwards. In a changing business environment, the customer will need to be able to monitor key performance indicators and to modify the business rules to suit the ever-changing marketing requirements and customer needs. In order to support these change requirements and respond them swiftly and efficiently some changes in EFFICIENCY set up, user interface or reporting may be essential.

ECM covers the entire change requirements from the needs analysis through to sign-off during the operational lifecycle of EFFICIENCY. It encompasses all activities that may take place throughout the life of a change process as if they are mini implementation processes:

Taking advantage of EFFICIENCY's analytical abilities, your organisation will be able to achieve a competitive advantage through change and development. ECM will support you through those changes, with clear documentation at every step of the way.

## ***Customisations***

All customer enhancement requests are recorded and analysed by our development and marketing teams and their level of impact and global benefits are assessed. If the enhancement relates to a specific business rules or a trade secret, it is classified as customisation and provided to the customer accordingly. On the other hand, if it is potentially a contributor to the product functionality then it's included in the enhancement program and is released within 6 months of the request date. Fast tracking is available to customers requiring enhancements before the scheduled release date (a small fee is payable).

EFFICIENCY is implemented on the base of the Basic CRM Package which includes System Manager; Supervisor; Reports; Company; Contact and Client Management; Activity Manager; and Workflow modules. Each additional module is chosen by the customer to suit their business requirements. Essentially, EFFICIENCY Clients have all customised their individual applications.

## *EFFICIENCY Training*

Common elements of all EFFICIENCY Training Courses include introduction of principles and structure as well as the central elements and terminology of EFFICIENCY. The courses will train the user on how to make use of EFFICIENCY's many functionalities within the products you have purchased.

The courses delivered by the experienced EFFICIENCY trainers are designed for pre- and post-implementation customers and cover all aspects of our product modules, from straightforward introductory courses to more advanced database, support, and reporting sessions.

The standard EFFICIENCY course is typically tailored to trainers, super-users and administrators of the organisation. Specially designed and tailored end user courses are also available.

The courses are usually conducted on the customer's premises using the real data in training mode.

## *EFFICIENCY CRED*

CRED is EFFICIENCY's unique software maintenance and annual upgrade policy, which provides significant user benefits. The software maintenance program is designed to provide significantly more than functionality, speed, accessibility, and simplicity.

CRED, (Correction, Research, Enhancement and Development abbreviated), includes: program corrections; continued research into the most recent and emerging technologies; enhancements resulting from AVA Systems research and user-group contributions that ensure EFFICIENCY continues to create and sustain a competitive edge in business; and routine development of EFFICIENCY such as using the latest version of development tools and database technology. EFFICIENCY software versions are usually supplied on CD-Rom quarterly for minor changes and half yearly for the major enhancements.

## *EFFICIENCY Pre-paid Support Agreements*

Pre-paid support agreements allows clients an interim period, typical 90 days, after 1 – 2 staff are fully trained and designated to request support from AVA Systems. This streamlines the clients' internal support function and ensures internal staff can answer queries while an internal knowledge base is being accumulated.

AVA Systems logs all support items in EFFICIENCY's Support Module. Every support item receives a CSR (Customer Support Request) number. Clients are provided with a quarterly CSR report which provides a listing of all questions, the result and the time spent on these questions.

## *Pricing*

EFFICIENCY is implemented and operated at a much lower total cost of ownership by far in comparisons to any other mid to high range CRM product because EFFICIENCY's:

- software license fee is based on the Australian Dollar. This creates an immediate pricing benefit up to 3 times over American and European software due to currency exchange rates;
- The current versions only development costs are to meet and exceed technological demands; the contribution of the development costs to the price of software is considerably lower than the competitors.
- current licence fee is based on the products natural evolution. Most competitor prices are based on the high return requirements expected from the high investments as part of the recent "dot.com hype" and/or the high cost effects of their globalisation based marketing and distribution efforts;
- advanced form of software maintenance arrangement, CRED, has been in use since the first release and the very low consultancy, implementation and customisation requirements which is typically many times more for US and European based recent CRM systems.
- parameter driven programming and database objects have been developed and refined over the years make the customisation and implementation changes very

simple and quick without any programming requirements only using the database and form painters.

## *About AVA Systems*

AVA Systems Pty Ltd is a privately owned Australian company founded in 1987. The business objective was and still is to develop and market EFFICIENCY -Total Business and Client Management software system following the original conception in 1985 by the founder of the company.

AVA Systems highly specialised team provides system analysis, design, development, support and training services to its business partners and end users or EFFICIENCY. Since foundation, its fields of expertise have been extensively channelled into the usage of Power Builder and Microsoft development tools and SQL databases in general.

Over the years EFFICIENCY has been successfully implemented by many organisations with a vast range of business interests including finance, distribution, engineering, non profit organisations such as clubs, charities, associations, service and maintenance and marketing

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## *More information?*

Some of our clients are happy to provide a brief telephone reference. Please contact us for details.

For more information, visit our web site at [www.avasystems.com.au](http://www.avasystems.com.au), phone +61 2 9906 3505 or email us at [sales@avasystems.com.au](mailto:sales@avasystems.com.au)