Policies and Procedures

ROGERS & WELLS, LLP
ON-SITE OPERATIONS AND ESCALATION

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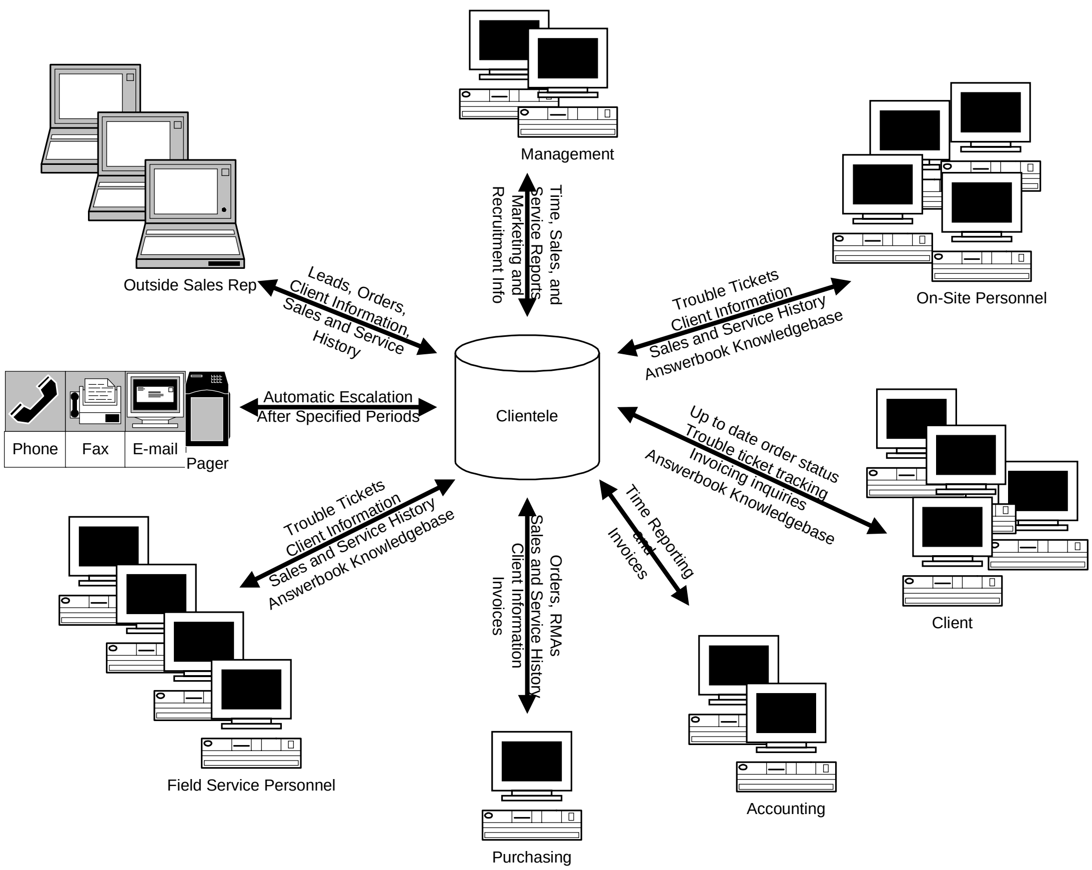

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INTRODUCTION

1.1. General

This document describes procedures for the normal daily operations of BEC on-site customer support personnel. This document also describes the procedure for escalation to on-call personnel.

1.2. Terms

Team Leader	On-site BEC staff member responsible for supporting the client site, and for the BEC team on sites where there is more than one Customer Support Analyst.
Customer Support Analyst	The members of a BEC on-site team other than the Team Leader.
On-Call Engineer	BEC senior engineers available 24 hours to the on-site staff in case of emergency.

1.3. Procedure Owner

1.3.1. Team Leader

The Team Leader is responsible for ensuring that these procedures are carried out. The Team Leader is also responsible for revision and distribution of these procedures at their site.

1.4. Key Participants

1.4.1. Team Leader

The Team Leader supports one shift of network coverage, supervises the BEC on-site staff, and provides performance and status reports to the client and BEC management.

The Team Leader reports to the On-Site Service Manager

1.4.2. Customer Support Analysts

The Customer Support Analysts support contracted hours of coverage of the client network. They are responsible for the continuous operation of file servers, workstations, printers, and other network devices that the client has contraced with BEC to support.

The Customer Support Analysts report to the Team Leader and the On-Site Service Manager. Use of this term includes the Team Leader unless stated otherwise.

1.4.3. On-Call Engineers

The On-Call Engineers are available to the on-site personnel for emergency escalation purposes. Calls to the On-Call Engineers should be coordinated by the Team Leader.

The On-Call Engineers report to the BEC Chief Technology Officer.

PROCEDURES

1.5. Hours of Operation

Unless contracted otherwise, support of the network provided in one or more staggered shifts, Monday through Friday, between 8:00 am to 6:00 pm depending on contractual arrangements. Some clients also contract for weekend coverage as well.

Typical shifts are as follows:

Monday - Friday	Weekends
8:00am – 5:00pm	7:00am – 7:00pm
8:30am – 5:30pm	7:00pm – 7:00am
9:00am – 6:00pm	

In multiple shift situations, On-Site personnel are not to leave their post until relieved, even in emergency situations.

1.6. Time Reporting

Customer Support Analysts must call in to the BEC Help Desk (496-2140) upon arrival at, and before departure from, the client site.

All personnel must also connect to the BEC offices via MetaFrame to record their hours using the Quickbooks Timer. Time is recorded on a Saturday through Friday basis. Employee Time should be exported weekly and e-mailed to John Wolf no later than noon of the Monday of the next week.

For example: Time would be recorded for the week of Saturday, September 19th through Friday, September 25th. The data should be exported and e-mailed to John Wolf (wolfj@becltd.com) by noon on Monday, September 28th.

1.7. Absences and Early Departures

In the event that a Customer Support Analyst cannot make an assigned shift or must leave the site for any reason, it is the responsibility of the Customer Support Analyst to contact the Team Leader and/or the On-Site Service Manager to make arrangements.

1.7.1. Absence With Advance Notice

In cases where the absence is known in advance, it is the responsibility of the Team Leader to ensure that the shift is covered.

1.7.2. Late Arrival

In cases where the next shift is late, the engineer on-site should inform the Team Leader of the situation and wait for the arrival of their replacement.

1.8. Escalation

BEC Engineers are available on-call to assist with emergency situations on a rotating basis. A schedule of who is on-call on a given night will be distributed.

Requests for assistance from the On-Call Engineers should be channeled through the Team Leader. The Team Leader will assess the nature of the emergency and determine if additional expertise is required.

On-Call Engineers will be contacted at the discretion of the Team Leader unless the Team Leader is not available. Customer Support Analysts are only authorized to call the scheduled On-Call Engineer directly when the Team Leader is not available.

METRICS

Data will be collected regarding the operation and performance of all On-Site Customer Support Personnel.

1.9. Activity Logs

The Customer Support Analysts will connect to the BEC network via MetaFrame and log all their activities into the Clientele Customer Information System unless the client has their own help desk system. In those cases, reports of each analyst's activities should be compiled by the Team Leader and attached with the Team Leader's Weekly Activity Report (see below).

1.9.1. Entering Calls

It is very important to enter all calls into Clientele. This serves as a record of activity which the client uses to justify retaining BEC services. The number of calls and the details provided about them helps determine how many people are assigned to a client, what level of person is required, how much the client is willing to pay for those people, etc.

1.9.2. Appropriate Language

It is important to remember when entering information into Clientele that these entries represent a permanent, tangible record that is shared with our client contacts and their management.

You should be careful to use "politically correct" and client-friendly language that will not offend or insult anyone. Due to the high visibility of this information, it is important that these guidelines are followed and maintained.

All calls will be reviewed by the Team Leader and BEC Management, and severe measures will be taken to ensure that infractions of the policy do not occur a second time.

1.10. Weekly Activity Report

The Team Leader is responsible for completing a Weekly Activity report that summarizes the work done by their team for the week. See Section 7.

In addition, two reports from Clientele should also be compiled by the Team Leader and sent in along with the Weekly Activity report.

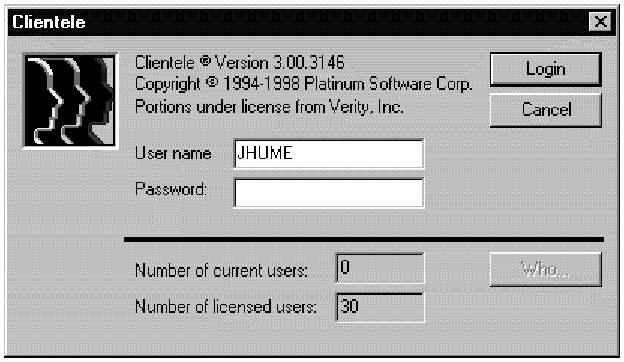
See Print Call Reports for details. See Section 8. for samples of these reports.

USING CLIENTELE

BEC has committed to using Clientele for all service record keeping. All activities are required to be entered into Clientele The following procedures illustrate the primary forms and describe how to use them.

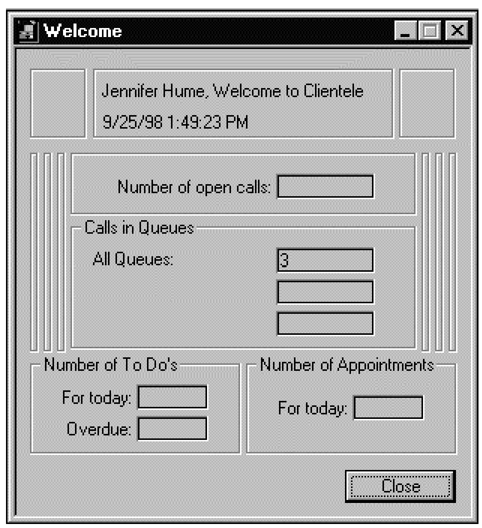
1.11. Logging in to Clientele

Clientele is accessed via MetaFrame. Once logged into the BEC network via MetaFrame, there is a Clientele icon on the desktop. Double click on the Clientele icon.



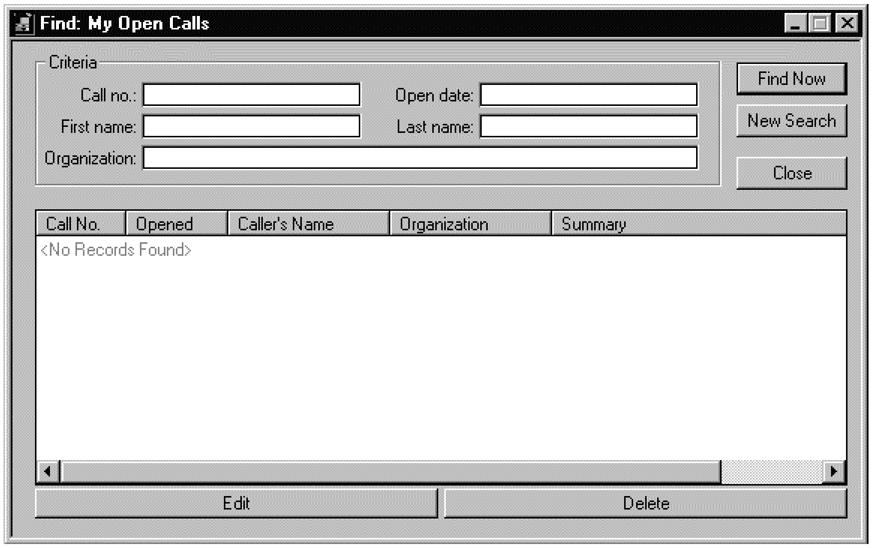
The Clientele login form appears with the NT account that is logged in by default. There are no passwords for Clientele at present, so press Enter to continue.

1.12. The Welcome Form



The initial form you see is the Welcome form. This form gives you a snapshot of your calls and appointments in Clientele.

1.13. Find: My Open Calls

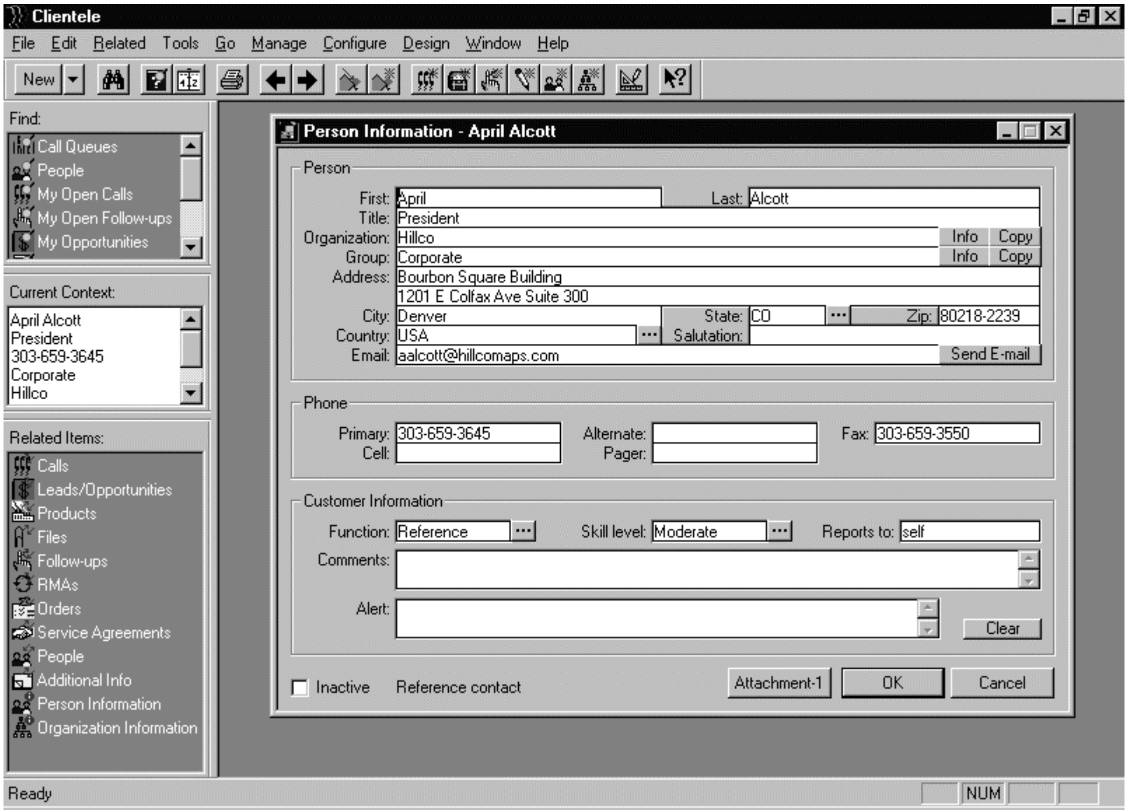


Once past the Welcome form, the Files: My Open Calls form appears. This form is used to find calls that are any status other than Closed. To find a call, enter whatever information you have about the call and click Find Now.

To assist with searches, there are several wildcard options listed below. These wildcards apply to all Find forms.

Enter	To Find	Finds
Lang	Built-in wildcard match with records beginning with LANG	Langson, Lang. Langford
=	Blank elements	(blank field)
* or ..	All records with some value in the field	All records where field is not null
*sen	Values ending with “sen”	Hensen, Johnsen
sen	Values containing “sen” somewhere in them	Hansen, Johnsen, Asenoa, Sentry
!Al	Records that do not begin with Al	Andrews, Amherst, Hansen
!=	Records with values in the field	(anything)
LA | K	Records starting with LA or with K	Kesey, Lang
????9	Records with at least 5 characters, where the fifth is a 9	12349, 99999, sn009
#####	Records with at least 5 numeric characters	12345, 99999
>1/1/98	Records on or after 1/1/98	All records on or after 1/1/98
<1/1/98	Records on or before 1/1/98	All records on or before 1/1/98

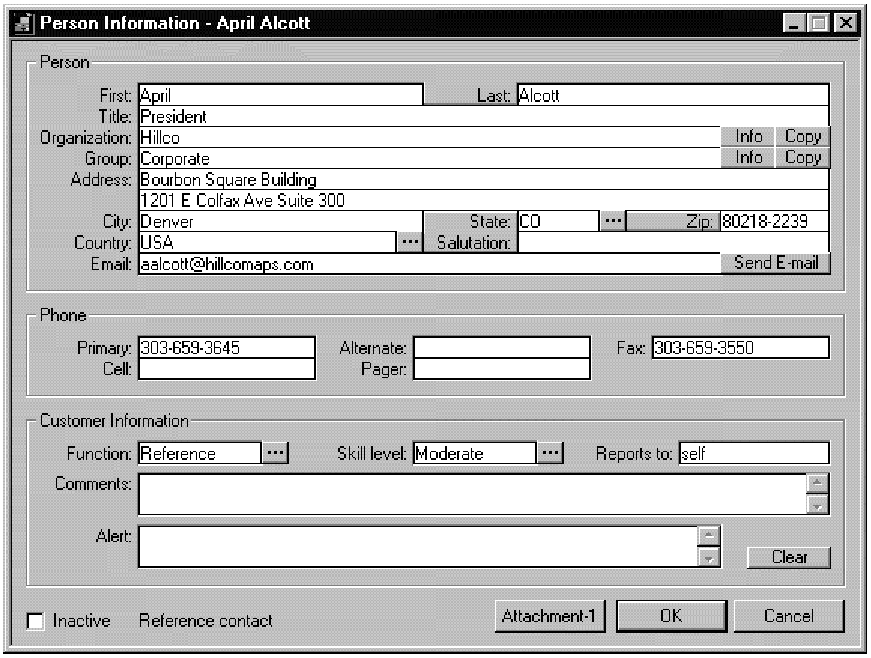
1.14. Context



Once you select a record, the form changes. The elements of the form are listed below:

Element	Description
Toolbar	The toolbar has several unique buttons on it of note. New is used to quickly create new data records The Binoculars clear to current context and return you to the Find: New Calls form
Find Pane	Used to bring up the Find forms for locating information in the database
Curerent Context Pane	When you select a Person or Organization, that Person or Organization becomes the current context and is displayed here
Related Pane	When a current context is established, the items in this pane will search the database and list all records related to the Person, Group or Organization
Work Area	The right side of the form is where all manipulation of the data takes place.

1.15. The Person Information Form



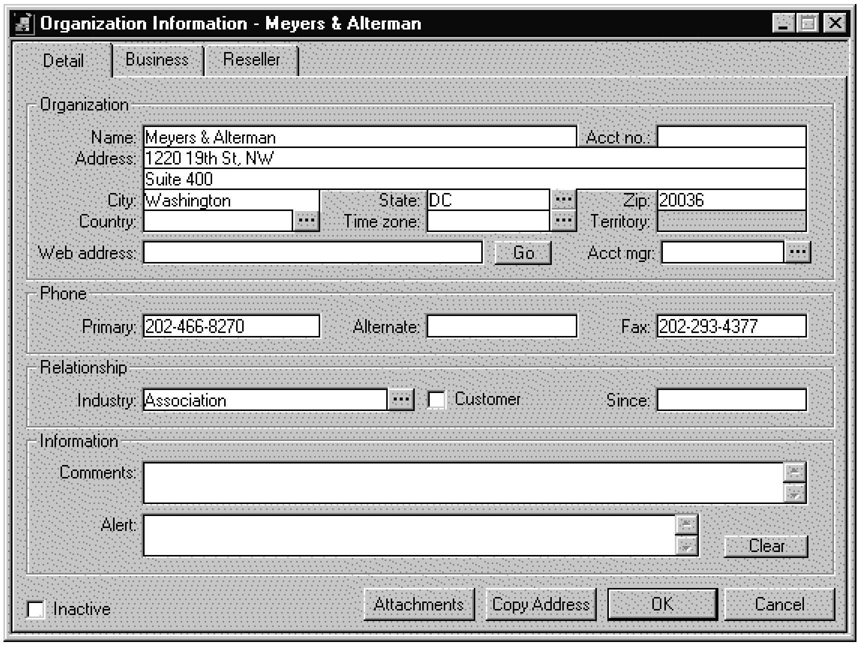
A Person Information record is required for everyone who requests service or support. Where possible, client information will be provided by the client and imported, but in many cases you will be required to input and/or update the information in the system.

The relevant elements are

Field	Description
First	Customer's legal first name
Last	Customer's legal last name
Title	Customer's title
Organization	The BEC client company that the customer works for. If the organization already exists in Clientele, you can select the Copy button to copy the common information into a new Person Information record.
Group	For clients that have distinct groups or different locations, this field is used. If the group already exists in Clientele, you can select the Copy button to copy the common information into a new Person Information record.
Address, City, State, Zip, Country	Customer's legal address
Salutation	Dr., Mr., Mrs., Ms. – The appropriate salutation for a letter or other written correspondence.
E-Mail	The customer's Internet e-mail address. You should remember that Clientele is used by all BEC staff, not just those on-site.
Phone(s)	Enter the appropriate phone numbers. Use the Primary for direct dial numbers and the Alternate for mail switchboard numbers.
Customer Information	These elements are used to prepare the person servicing the call. They give an insight into the person calling.
Function	Describes the callers role in the client organization

Field	Description
Skill Level	Their level of computer literacy
Reports to	Where they fall in the organization's structure
Comments	Any useful information about the individual. This information must be in a form that can be given to the client. Make sure it is politically correct and client-friendly.
Alert	The information in this field is displayed whenever this Person Information record is called up. It should be used as a warning of something important the person servicing the call should know about this person
Attachments	Allows you to attach files to the Person record. Files are copied to the Clientele server.

1.16. The Organization Information Form



The Organization Information Form provides information about clients and organizations that have been provided as vendor leads, have contacted directly by our sales staff, or have called BEC themselves looking for service. The form is very similar to the Person Information form.

There are three tabs on the Organization Information form:

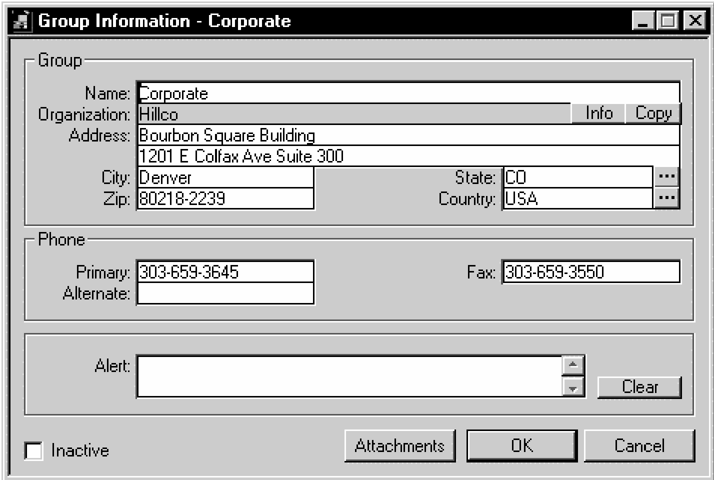
- The Detail tab contains the primary information about the organization and should be completed in full.
- The Business tab is used to record various information about the organization such as the type of business, number of employees, etc. This tab is optional.
- BEC is not using the Reseller tab.

The elements of the Detail tab are as follows:

Field	Description
Organization	The legal name of the organization as it appears on business cards, stationary or legal documents.
Acct No.	Number to be input from our accounting system for reference.
Address, City, State, Zip, Country	The legal address of the primary client site (ie. headquarters, billing address, etc.). For clients with multiple sites or billing locations that differ from the site of service, Group entries will be created for both locations
Web address	The client’s web site. If the client has a web site for partners or other than public access that we are granted access to, that address should be entered here, with login and password entered in the Comments field below.
Acct Mgr	The BEC Sales Representative assigned to this organization.

Field	Description
Phone	Use the Primary field for the main switchboard/operator number for the client. Use the Alternate number of there is more than one.
Field	Description
Relationship	This will be used to designate levels of contractual agreement with different clients, as well as for categorizing callers. BEC Gold and Platnum Partners will be indicated here.
Customer	Click this box if the organization is a current customer of BEC.
Since	Indicates that date of first contact with this organization.
Comments	Any useful information about the organization. This information must be in a form that can be given to the client. Make sure it is politically correct and client-friendly.
Alert	The information in this field is displayed whenever this Organization Information record is called up. It should be used as a warning of something important the person servicing the call should know about this organization
Copy Address	Click this button to copy the address from a Person Information form. The Person Information form must be open to do so.
Attachments	Allows you to attach files to the Organization record. Files are copied to the Clientele server. LAN Maps and other information relevant to the site or group should be attached to the Group record.

1.17. Group Information Form



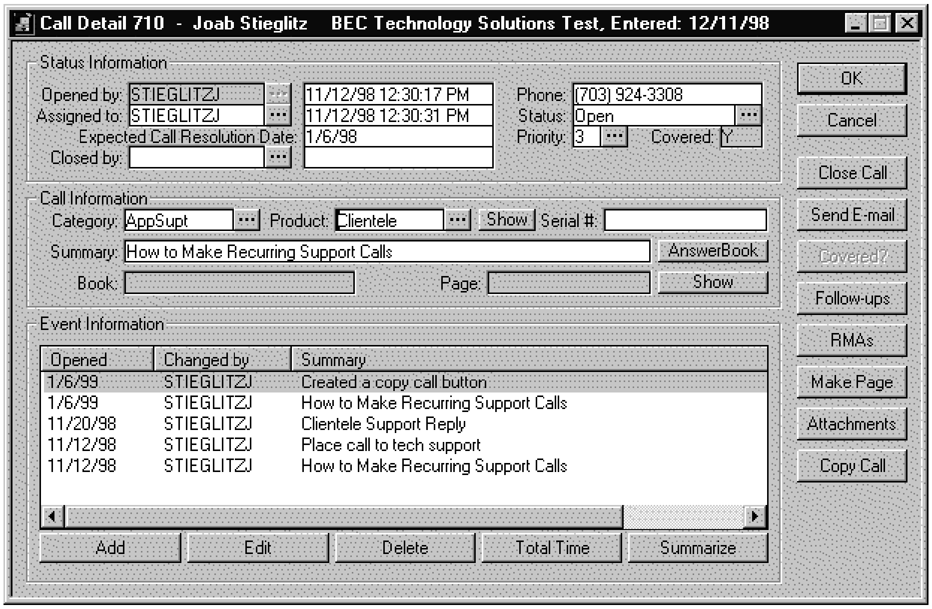
The Group Information form is used to record information on the relevant sub-organizations of BEC clients. The form is used primarily for two purposes:

- Organizations the have mulitple locations (ie. headquarters in New York and the DC office that we support);
- Organizations that are divided into multiple groups (ie. the organization is composed of several smaller companies, or different departments that have different budgetary sources.)

The relevant elements in the Group Information form are:

Field	Description
Name	The official designation of the group. If a company, then the legal name of that company
Organization	Group information records are always linked to an existing organization. The find the organization, enter the first few characters of the Organization name and click on Info. Once the organization is identified, you can click on Copy in the Group Information form to copy the display organization's name and address.
Address, City, State, Zip, Country	The legal address of the client group site. This may or may not differ from the primary organization address, and should be adjusted accordingly.
Phone	Use the Primary field for the number for this client location. Use the Alternate number for switchboard/operator of the main organization location.
Alert	The information in this field is displayed whenever this Group Information record is called up. It should be used as a warning of something important the person servicing the call should know about this organization
Attachments	Allows you to attach files to the Group record. Files are copied to the Clientele server. LAN Maps and other information relevant to the site or group should be attached to the Group record.

1.18. Call Detail Form

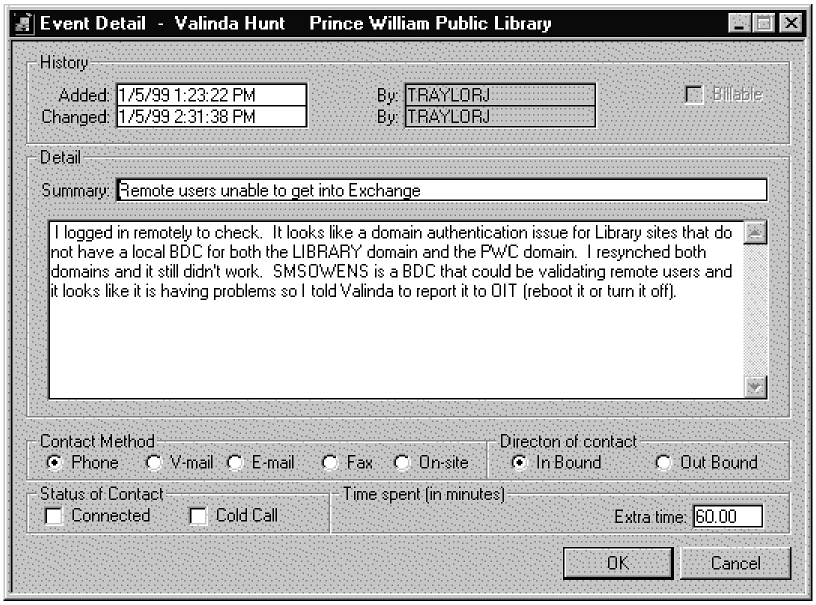


The Call Detail Form is the heart of Clientele. All day-to-day on-site support activities are recorded here. The elements of the Call Detail form are as follows.

Field	Description
Opened By Assigned To	Clientele automatically records the ID of the user who creates the call as well as the time and date in both fields. Calls can be reassigned.
Expected Resolution Date	The date that the call is estimated to be closed. This field should be updated regularly. It defaults to the Open Date
Closed By	Automatically filled when the Close Call button is pressed (see below)
Phone	Automatically inserts the phone number of the Person in context. It can be changed manually.
Status	Automatically adjusted by Clientele based on last activity. Can be changed manually.
Priority	Manually set. The default is 3 (Medium Priority)
Category	To simplify entry, all products have been organized into categories (ApptSupt, HWSupt, OS Supt, ServSupt, etc…). Once selected, the Product value list will appear with the associated products listed.
Product	Used to identify the nature of the call. The Product Value List contains all products related to the selected category. It can be manually edited from the Tools menu (See Maintenance).
Show	The show button will bring up a list of registered records of the item recorded in the Product field for cases where only specific products are supported for service.
Serial #	If a specific product is selected from the Show list, the serial number is recorded here.
Summary	The description of the problem
AnswerBook	Links to the AnswerBook reference system. Answerbooks is described later in this document.
Book	Indicates what AnswerBook contains the solution to this problem
Page	Indicates the page in the indicated AnswerBook
Show	Displays the indicated AnswerBook page

Field	Description
Event Information	Each activity related to a Call is recorded as an event. The events are displayed and accessed from here. If there is only one event, the text is displayed here (See Event Detail Form).
Add, Edit, Delete	Creation and modification of Events. Events are discussed later in this document.
Total Time	Clientele records the time that each Call Detail form is opened, including the time for each event. This button displays the total time spent on this call.
Summarize	Displays all the events for a Call in a single window.
Close Call Reopen	The Close Call button is used to close a call. It automatically updates the Closed by field with the ID of the user closing the call and the Time and Date. Once a call is closed, this button changes to Reopen, and is used to change the status back to open. The Assigned to fields are updated to the ID of the user reopening the call and the time and date.
Send E-Mail	This button copies all information recorded in the Call Detail and related Events forms to an e-mail message. This button should be used by the Team Leader when calls are escalated to Field Service personnel.
Covered?	This button will determine if the caller is covered under a blanket service agreement. If so, you will have the option to see the terms of the agreement.
Follow-ups	You have the option or scheduling a follow up reminder related to the call. Follow-Ups are discussed later in this document.
RMA’s	This button allows you to place or view an RMA on the covered device. At this time, RMAs will be coordinated by the Purchasing department.
Make Page	Copies the information in the Call Detail and Events forms for the purposes of creating an Answerbook page. The information is placed into an e-mail message to the Answerbook administrator for review and inclusion in an Answerbook.
Attachments	Allows you to attach files to the Call record. Files are copied to the Clientele server and stored in coded file names linked to the call record.
Copy Call	Copies the call information into a new call record for recurring service contracts.

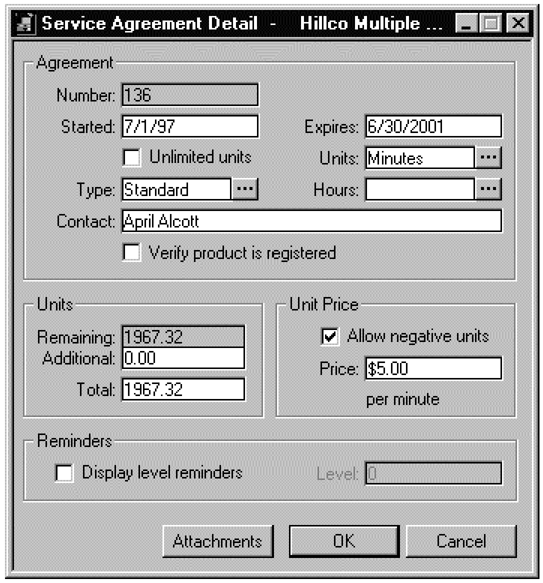
1.18.1. Event Detail Form



Event Detail forms are used to identify the stream of events related to servicing a call. Events are linked to and accessed via a Call record. The relevant fields are:

Field	Description
Added By Changed By	Automatically updated by Clientele with the relevant User Ids, dates and times
Billable	In most On-Site support cases, this box should not be checked as it will trigger the generation of a specific invoice.
Summary	Description of this event. It is useful if this description indicates some relationship to the preceeding events
Notes	The field below the Summary is used to make notes pertaining to the event
Contact Method	Indicate the means by which the details of this event were conducted. If several methods were used, indicate the one most relevant.
Direction of Contact	In-Bound means the caller contacted you; Out-Bound means you contacted the caller
Status of Contact	This will be Connected for all On-Site activities. Cold Call indicates that the caller's organization has no previous contact with BEC.
Time Spent	The time spent working on the event. This includes research, diagnosis, implementation, and travel time. Enter the time in decimal minutes. For example, you would enter 10 minutes and 30 seconds spent doing off-line research as 10.5.

1.19. Service Agreement Detail Form



The Service Agreement Detail form displays information regarding blanket service agreements an organization my have with BEC. The elements of the Service Agreement Detail form are:

Field	Description
Number	Automatically generated by Clientele
Started	Indicates the start date of the service contract
Expires	Indicates when the support agreement ends
Unlimited Units	The usual case for on-site support is Unlimited Units, indicating that the client does not get charged for each call.
Units	See the table below.
Type	Service level designed to fit a customer's specific needs. Service covers 24-hours over weekdays. Service covering your normal business hours.
Hours	24-hour service every day of the year. 24-hour service but only on weekdays. Service only during normal work hours when BEC is open.
Contact	Name of the client contact who responsible for the contract.
Verify Product is Registered	This field is only checked when the service agreement covers specific items at the client site. In most on-site situation, this option will not be checked.
Units	Remaining is automatically adjusted by Clientele when Calls are created and edited. Additional is used to add additional units to a contract after the fact. The sum is displayed in the Total field.

Field	Description
Allow negative units	This box is checked in order to allow the creation of Calls after the terms of the service agreement have been exhausted. In most cases this will be checked. Otherwise you will not be able to create new calls until they have signed a new contract.
Price	This is the dollar value per minute subtracted from the Total Units per call. If the Units are not set to dollars, this value is entered into the appropriate formula, and that amount is deducted.
Display level reminders	This field is used to display a reminder on the screen when a the client's balance on the support agreement falls below to specified level entered in the Level field. This reminder should be relayed to the caller.
Attachments	Allows for files to be attached to the Service Agreement record. An image of the signed contract should be attached here.

Clientele enables you to charge for service by number of calls, dollars or minutes, as described below:

Billing Options	Description
Calls	Bill for service based on number of calls. If using this option, when you open a call Clientele deducts one call from that customer's number of service units. Price indicates rate to charge for units that exceed the number of calls available by the agreement.
Dollars	Bill for service based on a dollar amount purchased. If using this option, Clientele deducts the amount of service provided based on the per-minute price set on the service agreement (i.e., length of call multiplied by price charged per minute). You must enter a price when using this option.
Minutes	Bill for service based on overall amount of service time purchased in minutes. If using this option, Clientele deducts the amount of time spent on a call or event. Price indicates rate to charge for units that exceed the number of units available by the agreement.

You can elect to bill for all events tied to a call. You can also bill for individual events.

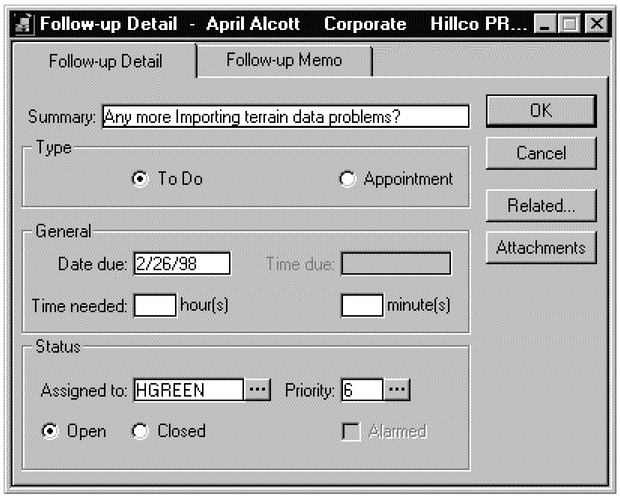
The time- and dollar-based options calculate the minutes or dollars you spend on an event and applies that total to a billing multiplier defined by your Clientele administrator. This enables your company to charge different rates for service provided by users with different skill sets or levels of experience. Clientele keeps track of how many units remain for a customer and alerts you whenever the current customer is running out of service units.

1.20. Follow-up Detail Form

Clientele provides a facility for setting Appointments and To Do items related to client activities called the Follow Up Manager. The Follow Up Manager form is accessed from within Clientele, but the Follow Up alerts can be run either from Outlook, or by running the Follow-Up Monitor application.

You can assign multiple follow-ups to a call. If a call has more than one follow-up, Clientele tells you how many follow-ups are attached. In either case, you can edit, add, or view follow-ups from the Call Detail form.

When you attempt to delete or close a call that has a follow-up attached to it, Clientele asks you if you want to view the follow up(s), delete or close the call, or cancel your deletion request.



1.20.1. To Do

A To Do is a follow-up that is scheduled for completion on a specific date by the Clientele user assigned to it. An example of a To Do would be a reminder to yourself to "Research Customer Bob's reporting problem"; this kind of follow-up task is set to become active on a specific day and remains in the database until it is closed or deleted.

1.20.2. Appointments

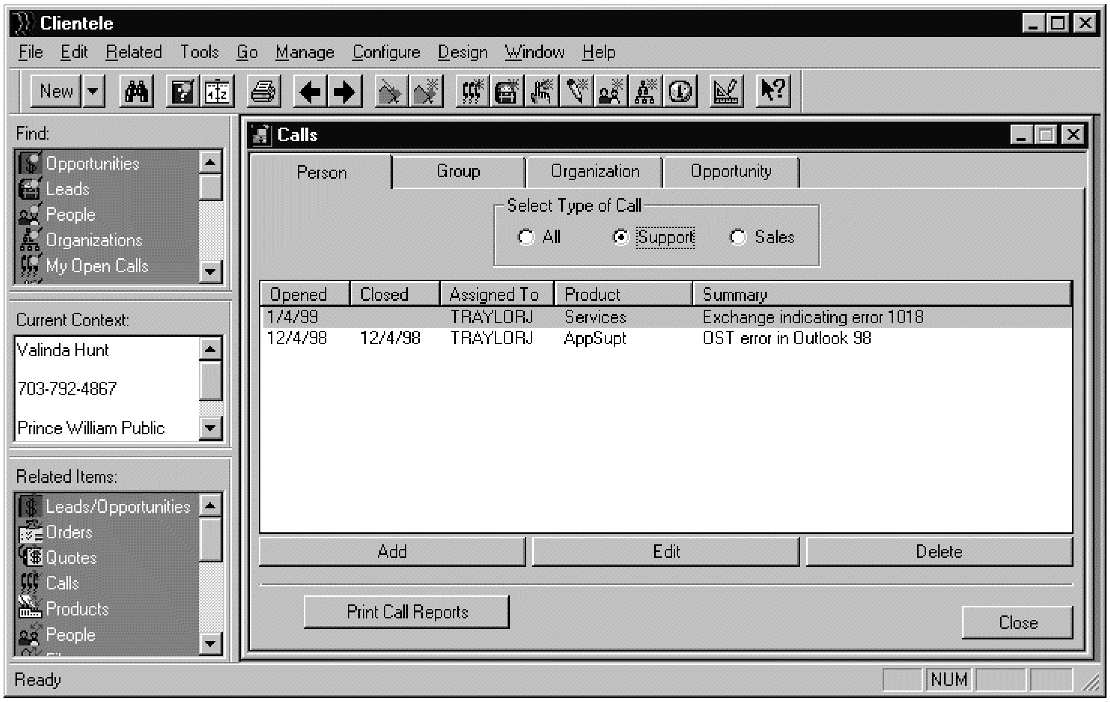
An Appointment is a follow-up scheduled to be completed on a specific date and time. Appointments can be alarmed to remind you about the commitment; the alarm becomes inactive after the scheduled date and time passes if the Follow-up Monitor detects it. Once the date and time for an Appointment passes, you can still view the Appointment by clicking on its date.

1.20.3. Follow Up Monitor

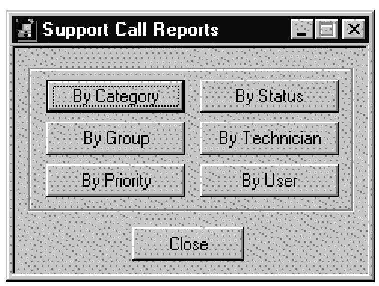
At this point, BEC has not linked Clientele to Outlook because, while Clientele will send updates to Outlook, Outlook does not automatically update Clientele, you must enter in Clientele manually. The Follow Up Monitor application sends an alert that includes a link directly to the Call in Clientele.

1.21. Printing Call Reports

To print reports related to the calls at your site, you need to pull up your client organization, and then select Calls from the Related Items frame. The form below will appear.



With your client's organization showing in the Current Context frame, you can click on the Print Call Reports button. This will bring up the menu below.

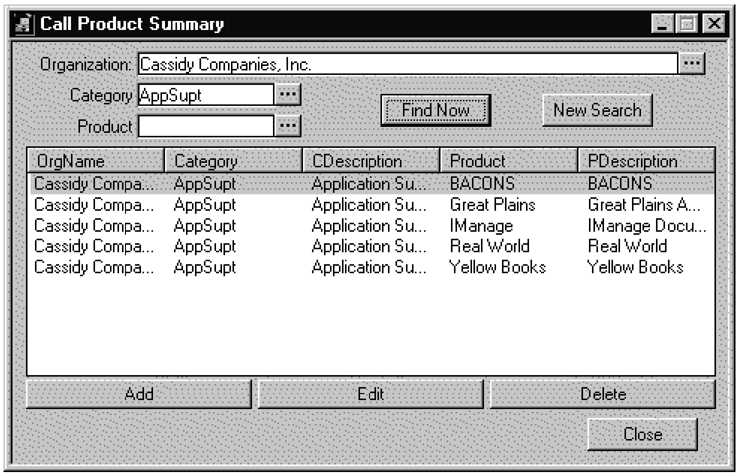


Clicking on the appropriate button will print a report of all support calls for the client organization, organized as indicated on the button. Examples of these reports are listed in Section 8..

1.22. Product Maintenance

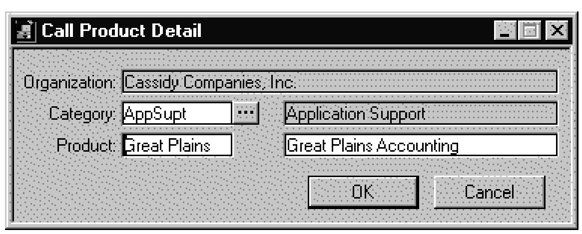
The products listed in the Support Call Detail form are not fixed. Additional items can be added to the list using the Product Value List option in the Tools menu. This should be done only as necessary. Too many products on the list will make the system too cumbersome.

When you select the Product Value List option from the Tools menu, the Call Product Summary form will appear.



Field	Description
Organization	Select the organization from the value list. To find products available to all organizations, select “All Organizations”.
Category	Select the category from the value list or leave blank to select all categories
Product	Select the product from the value list or leave blank to select all products
Find Now	Searches the Call Products table using the provided criteria
New Search	Clears the form to start a new search
Add, Edit, Delete	Creation and modification of Products. Products are discussed below.
Close	Closes the Call Product Summary form

When you click on the Add or Edit buttons, a Call Product Detail form appears. For Add, the form automatically captures the selected Organization and Category. An Organization must be selected in order to Add a new product.



Field	Description
Organization	The organization from the Call Product Summary form is read only
Category	Select the category from the value list. The description is automatically filled
Product	Enter the short description of the Product (ie. Word)
Description	Enter the long description of the product (ie. Microsoft Word)

Intelligence Gathering

Clientele is not just a Help Desk system, it is a Customer Information System. Through Clientele, BEC maintains complete information on all outside contacts. As a direct contact with the client, you form a vital link in the communication process, and Clientele provides the means for conveying information back to the staff at the office.

There are several different places in Clientele for you to provide information. It is important to use the correct one so that your vital information does not get lost or misfiled. These places are:

Form	Function
Leads	As you use Clientele, you will create sales. Each sales lead recorded in the Clientele database will be related to other records in the database that specify the organizations and individuals to whom BEC is selling, plus other information associated with the sales process. Leads move through a series of milestones until they become opportunities and, finally, sales. Clientele tracks the current status of all leads and helps to use formal Action Plans to move leads and opportunities to final resolution.
Additional Information	Use the Additional Information forms to maintain a free-form record of information about a customer. Additional information is related to a person, group, organization or opportunity. When you add additional information, Clientele relates it to the current context.
Competitors	Use competitor tips when you want to record information about a competitor that you can use in the future as you sell against the competitor. Clientele stores competitor tips in a knowledge base system called AnswerBook that enables you to store and retrieve full-text data. AnswerBook ensures that the information that you gather and record about a competitor will be available to your company and co-workers in the future.

Description of the relevant forms is provided in the next few sections.

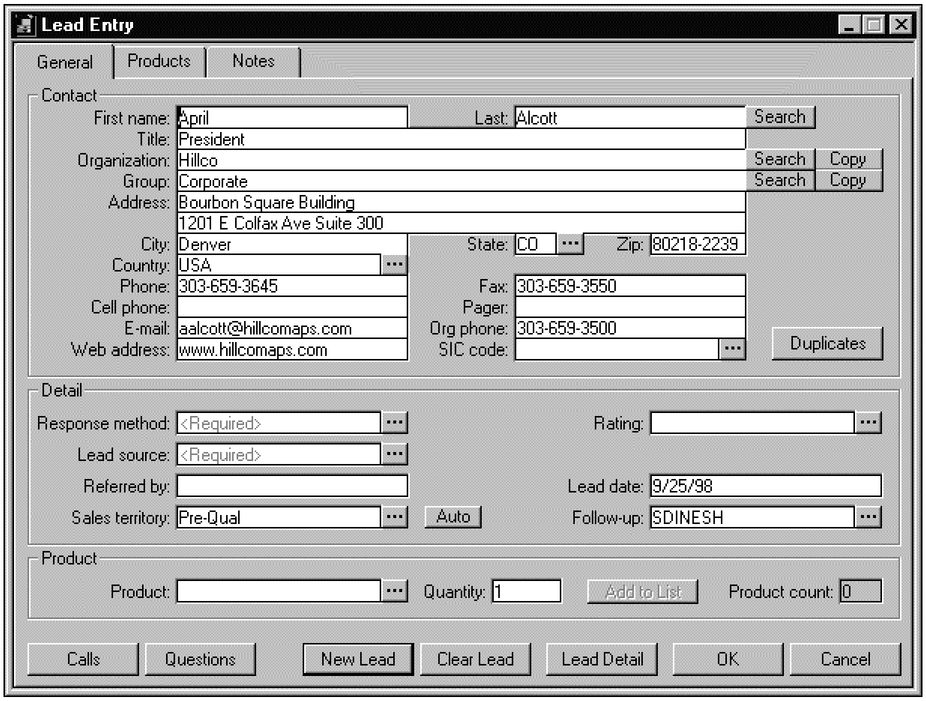
1.23. Leads

When you hear of information that may provide a future sale of products or services to the client, enter that information into a new Lead Entry form. The majority of information can be copied from the Person Information and/or Organization Information forms.

The leads you enter are considered Unqualified leads until the answers to a series of questions are obtained that fill out the details of the opportunity. In most cases, these questions will be pursued by the Sales staff.

1.23.1. Lead Entry Form

1.23.1.1. The General Tab

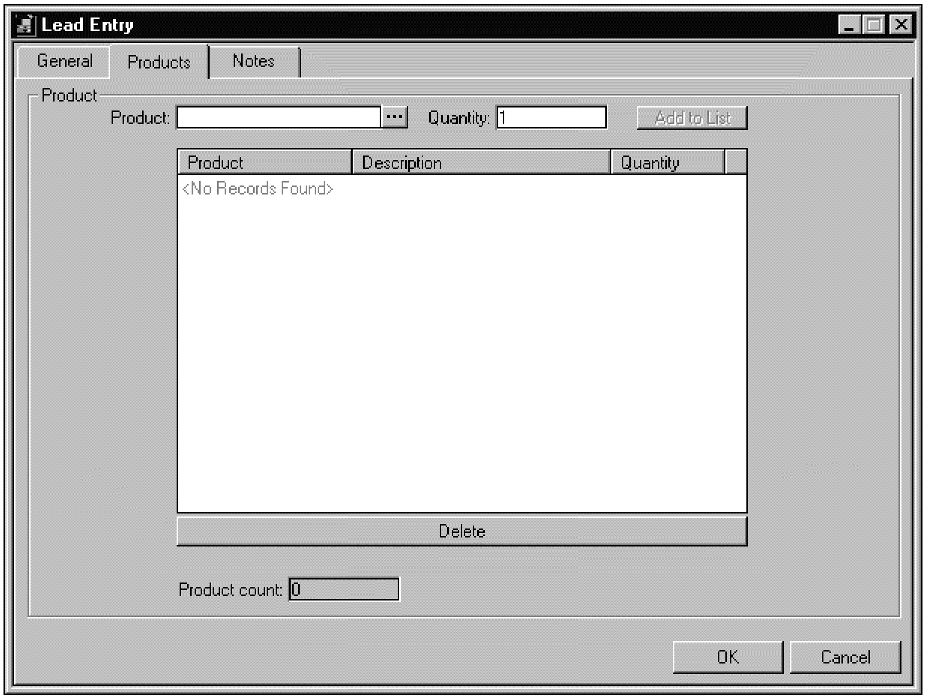


The fields unique to the General tab are described below:

Field	Description
Response Method	How was the lead brought to BEC (e.g., by telephone, by e-mail, conversation with you, etc.)
Lead Source	How the lead was obtained (e.g., newspaper ad, web site, etc.). In most cases, this will be through you.
Referred by	Who told you about the opportunity?
Sales Territory	Who the lead gets assigned to. This will be determined by the Sales staff
Rating	How likely is the sale?
Lead Date	When did you learn of the opportunity?
Follow-up	Who should follow up on this lead? This will be determined by the sales staff
Product	What are they interested in?
Quantity	How many?
Calls	Gives the option of creating a Sales or Support call record linked to this lead
Questions	Brings up the script for qualifying this lead
Lead Detail	Opens a Lead Detail form

There are two other tabs, Products and Notes, on the Lead Entry form to collect more detailed information.

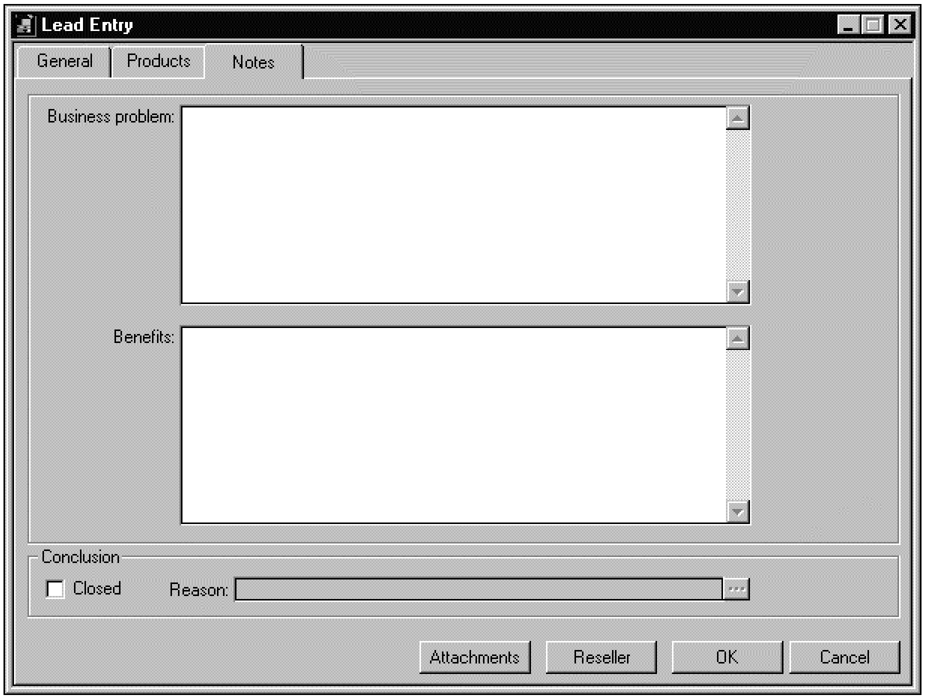
1.23.1.2. The Products Tab



The fields unique to the Products tab are described below:

Field	Description
Product	Multiple products can be added to the lead
Quantity	Enter the quantity required.

1.23.1.3. The Notes Tab



The fields unique to the Notes tab are described below:

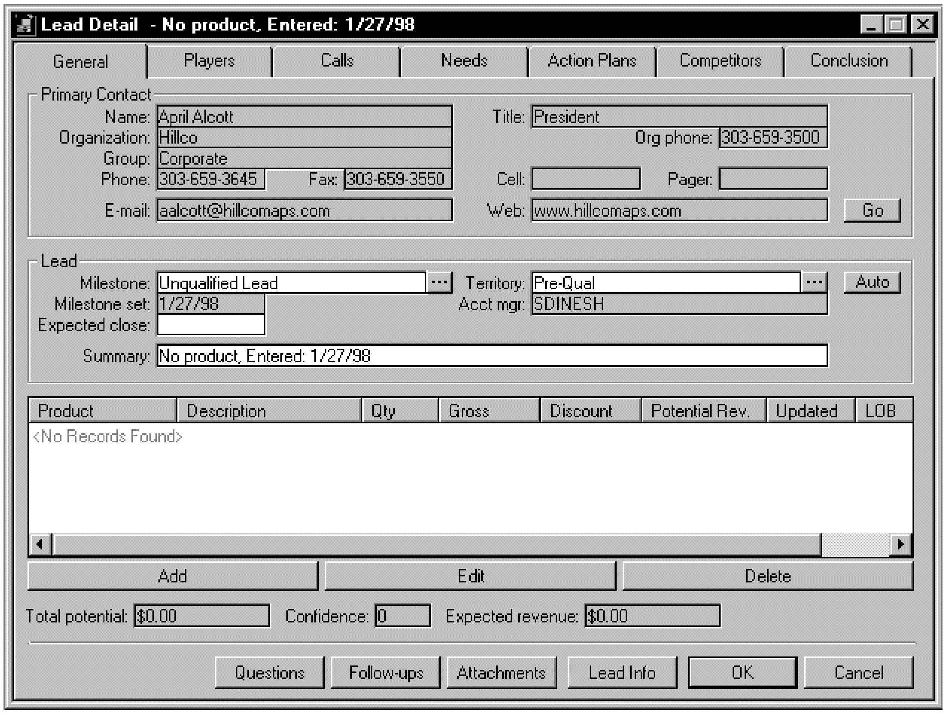
Field	Description
Business Problem	Describe what the client is looking to address.
Benefits	Describe what the client wants to be the result
Closed	Checked when the lead is finished
Reason	Why was the lead closed?

1.23.2. Lead Detail Form

Once a new lead has been entered, subsequent views of the lead are made with the Lead Detail Form. This form has seven tabs that follow the progress of a lead through to its conclusion as a Won or Lost sale.

The information entered in the Lead Entry form is presented in various fields on several of the tabs, and it is updated with additional information as the sales lifecycle progresses.

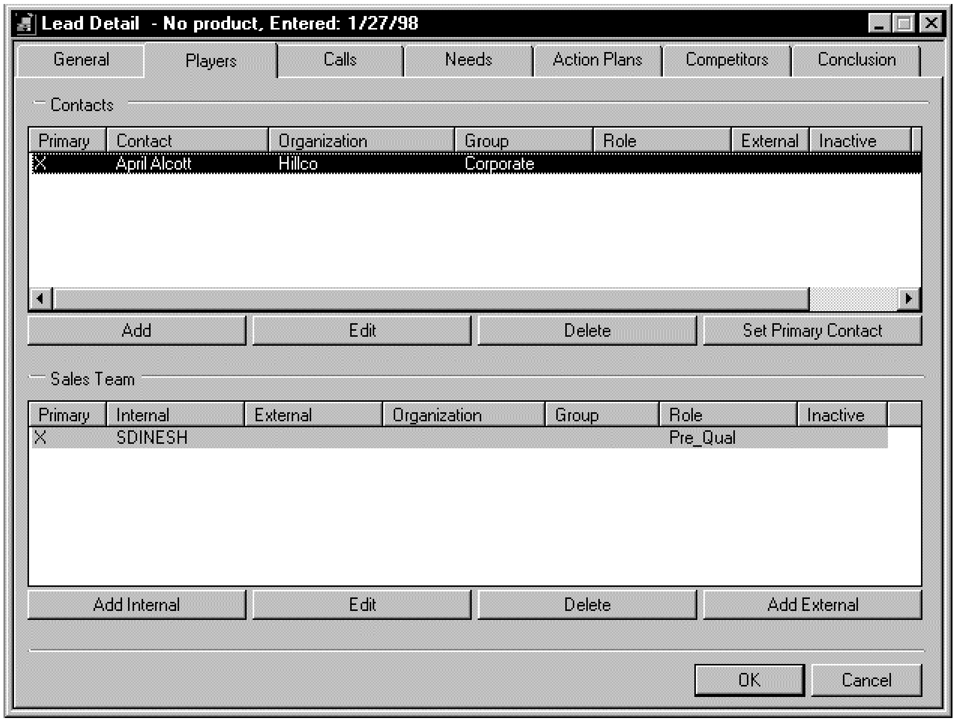
1.23.2.1. The General Tab



The General tab contains most of the information entered in the General tab of the Lead Entry form. It is supplemented by the following fields

Field	Description
Milestone	The current step in the Action Plan (see Action Plans)
Milestone met	Date last milestone was achieved
Expected close	Estimated date of sale
Territory	Who is responsible for the opportunity
Acct. Mgr.	Automatically assigned based on Territory
Summary	Description of the opportunity
Product	All products related to the opportunity
Total Potential	Potential dollar value of the opportunity
Confidence	Probability of a successful sale determined by the current step in the Action Plan
Expected Revenue	Product of Total Potential x Confidence

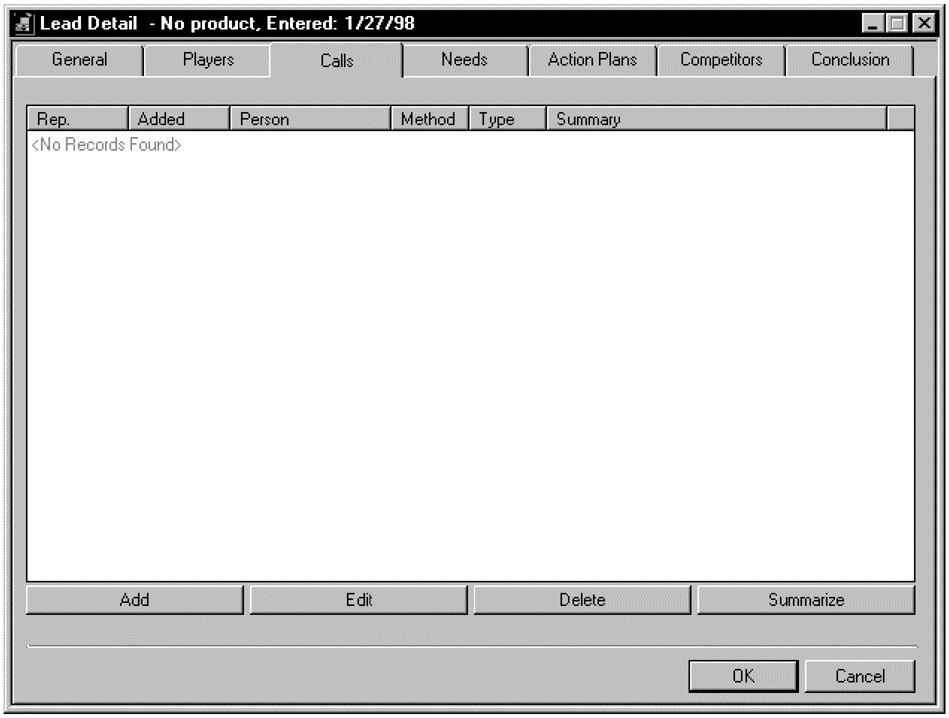
1.23.2.2. The Players Tab



The Players tab lists everyone involved with this opportunity. The Contacts frame lists consultants, contractors, and client personnel. The Sales Team frame lists all BEC involved.

Field	Description
Set Primary Contact	Indicates who on the client side is the main person to be communicated with
Add Internal	Used to add BEC staff (defined Clientele users) to the opportunity
Add External	Used to add other people to the opportunity who are not BEC staff (defined Clientele users)

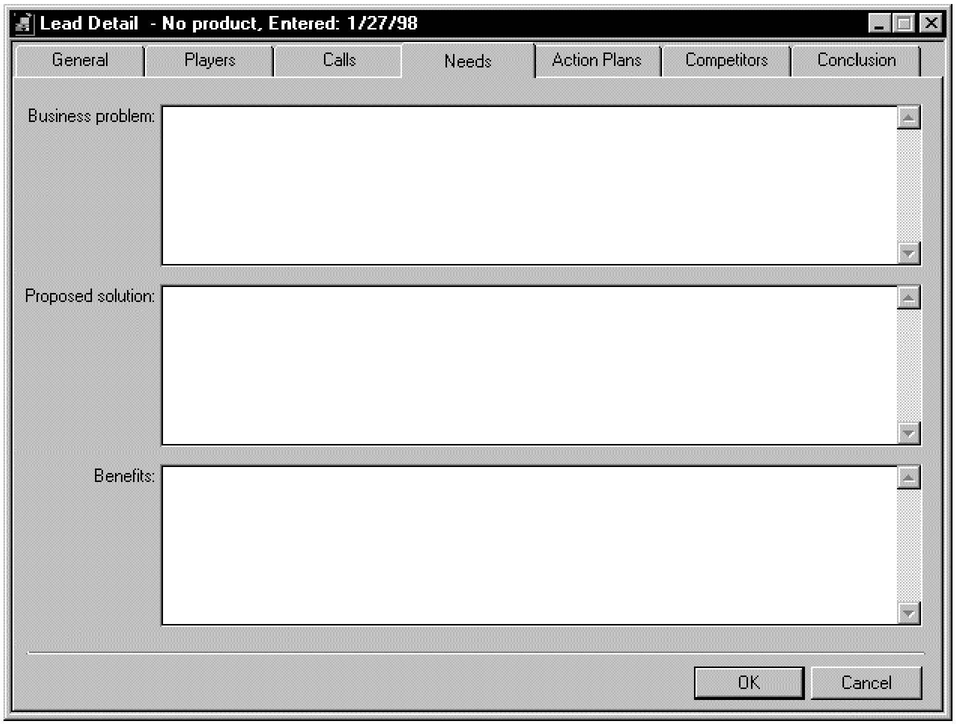
1.23.2.3. The Calls Tab



The Calls tab will list all contacts made with the client regarding this opportunity. This includes all related Sales as well as Support calls.

Field	Description
Summarize	Compiles the details of all listed calls into a single summary window.

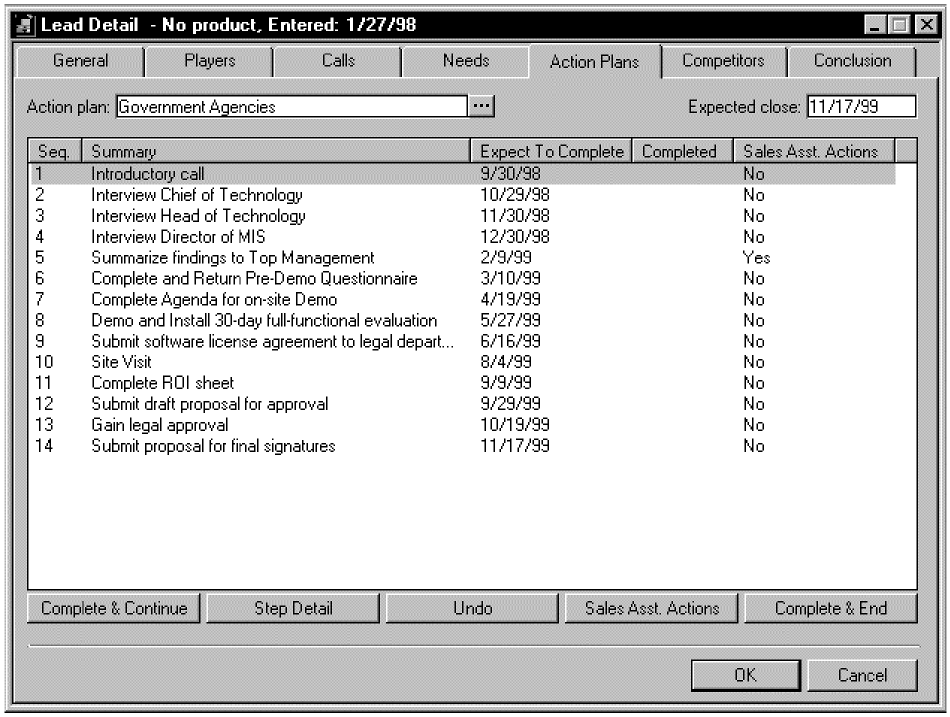
1.23.2.4. The Needs Tab



The Needs tab is used to outline how the Opportunity will be addressed.

Field	Description
Business Problem	What the client wants to address
Proposed Solution	How BEC proposes to address the problem
Benefits	The benefits of using the proposed solution

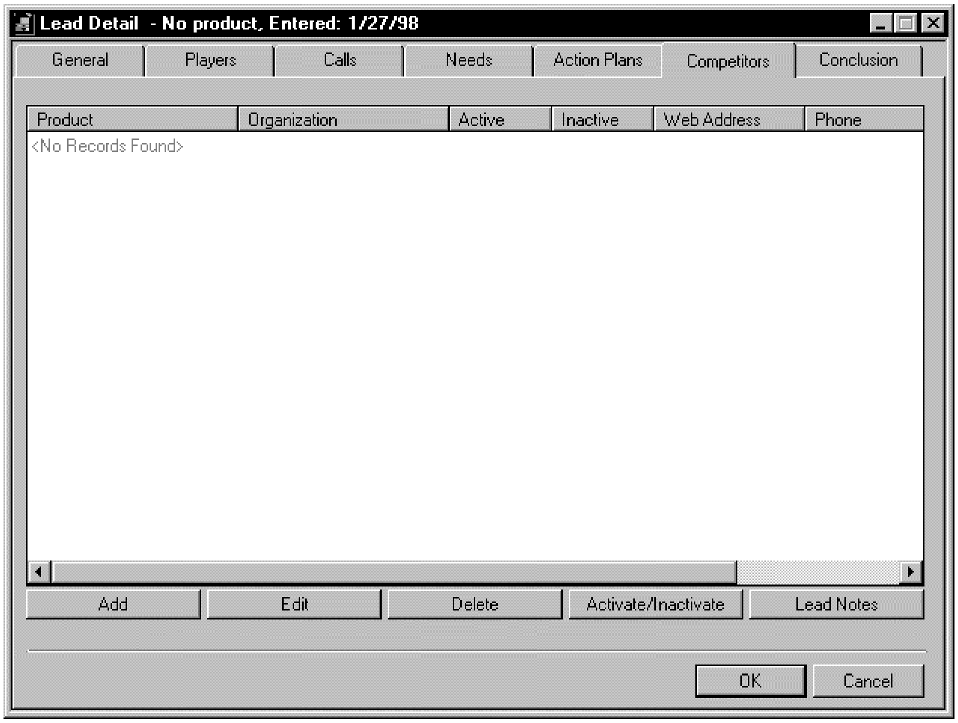
1.23.2.5. The Action Plans Tab



The Action Plans tab displays the process flow for achieving the sale. Different Actions Plans exist depending on various factors relating to the client. Each phase of the Action Plan represents a milestone with various activties to be completed before moving on to the next.

Field	Description
Complete & Continue	Marks the highlighted step as completed. If there are action items not completed, you are prompted to complete them or cancel
Step Detail	Displays the highlighted step's action items
Sales Asst. Actions	Displays the automated action items in the Action Plan
Complete & End	Closes the Opportunity

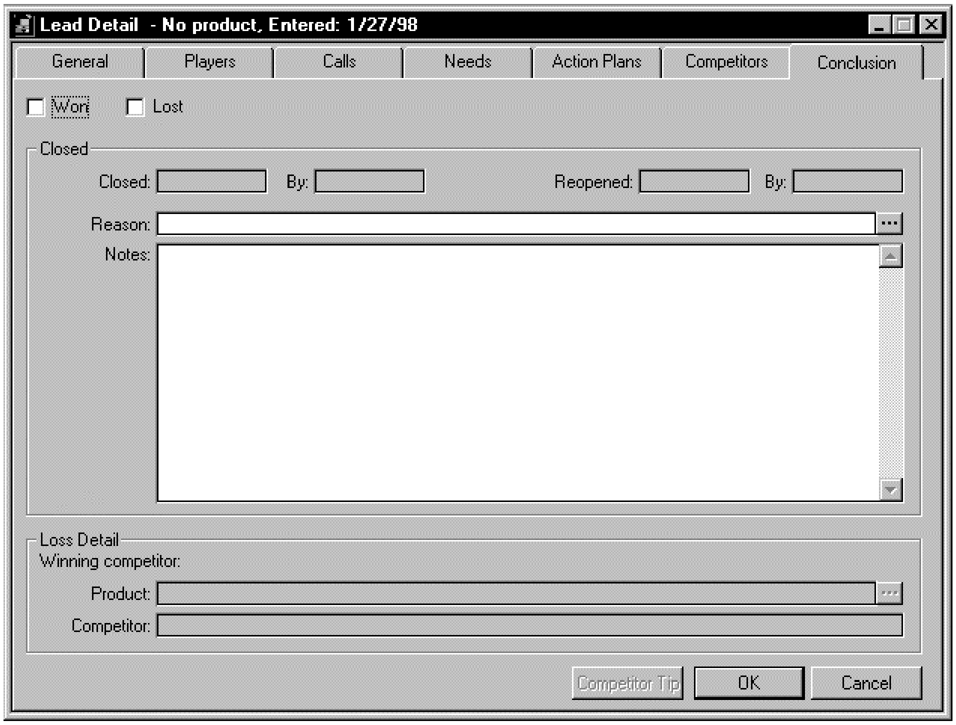
1.23.2.6. The Competitors Tab



The Competitors tab is used to display known competitors for this opportunity. The Competitor Information record for each can be accessed from here.

Field	Description
Activate/Inactivate	Indicates whether the competitor is a threat or not
Lead Notes	Presents a notes form for information related to this Opportunity

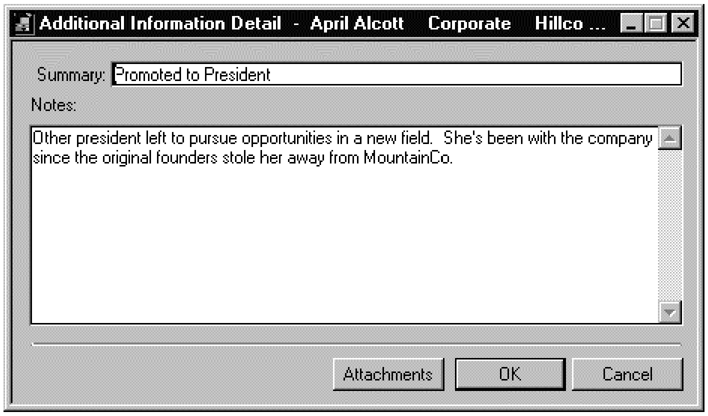
1.23.2.7. The Conclusion Tab



The Conclusion tab summarizes the opportunity. Full details of the outcome are entered here for use in the future with similar opportunities.

Field	Description
Closed	Automatically completed by Clientele with the User ID and date of the person who closes the opportunity
Reopened	Automatically completed by Clientele with the User ID and date of the person who reopens the opportunity
Reason	Cause of the outcome
Notes	Full details of why the sale was won or lost
Product	The product that was sold by our competitor to the client
Competitor	Who won the sale

1.24. Additional Information



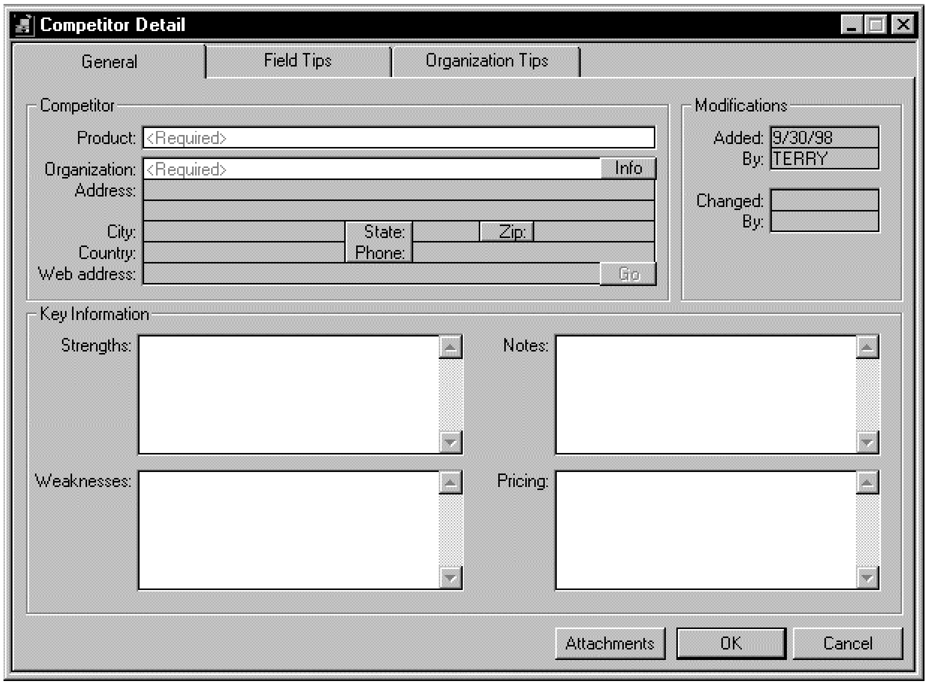
The Additional Information Detail form is used to note information about a Person or Organization. Multiple records can be applied to each Person or Organization.

Field	Description
Summary	A simple title
Notes	The details

1.25. Competitor Information

Competitor Information is a valuable tool that is necessary to improve our sales efforts. Anything you hear about other firms is of value. Information about other firms trying to influence BEC clients is vital.

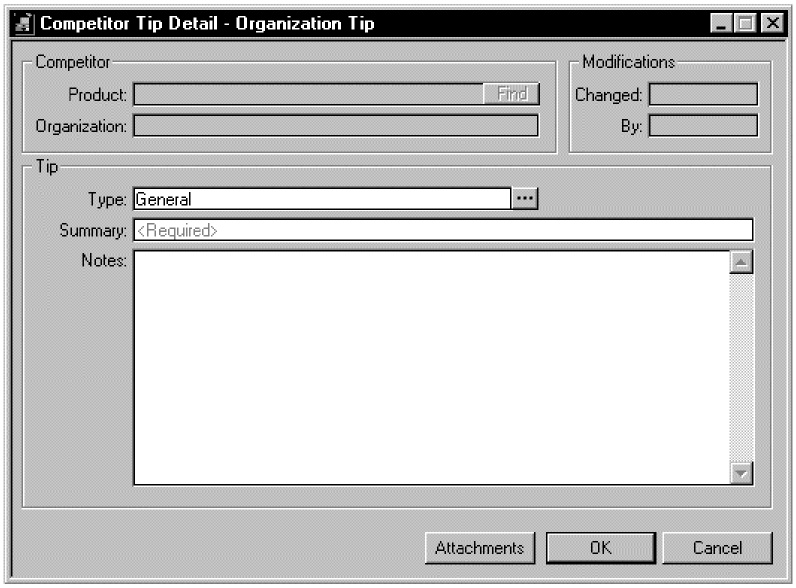
1.25.1. The General Tab



The General tab contains summary information about the competitor.

Field	Description
Product	The name of the competing product
Organization	The name of the competitor. This will be referenced against the Organization Information records. If a match is found, you can import the address information. Otherwise you will be prompted to enter a new Organization Information record.
Strengths	What advantages does the competitor have over BEC?
Weaknesses	What are their shortcomings?
Notes	Any other information of value
Pricing	How do their prices compare with ours?
Modifications	Revisions to this information over time.

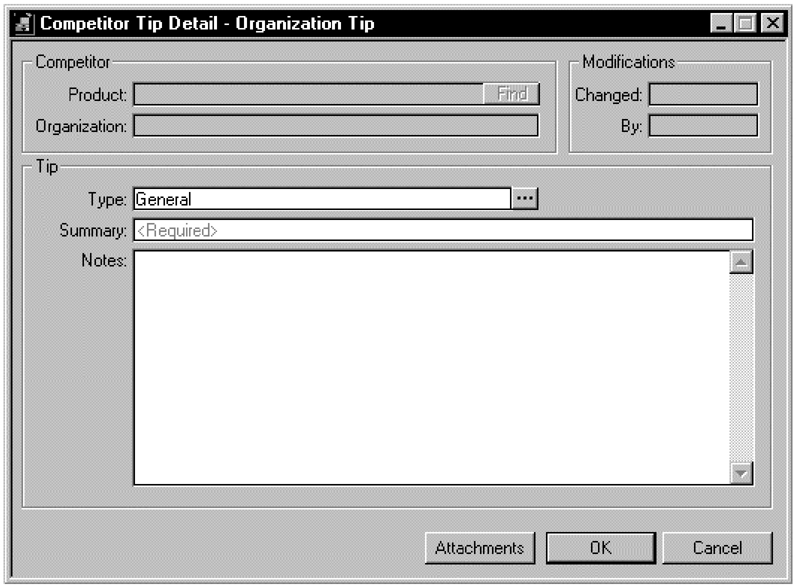
1.25.1.1. The Field Tips Tab



Field Tips are information related to a specific product or service.

Field	Description
Product	Automatically filled in from the General Tab
Organization	Automatically filled in from the General Tab
Modifications	Automatically updated by Clientele with the User ID, date and time of the user making the changes.
Type	Categorizes the tip
Summary	Brief description for searching on
Notes	Details regarding a competing product or service

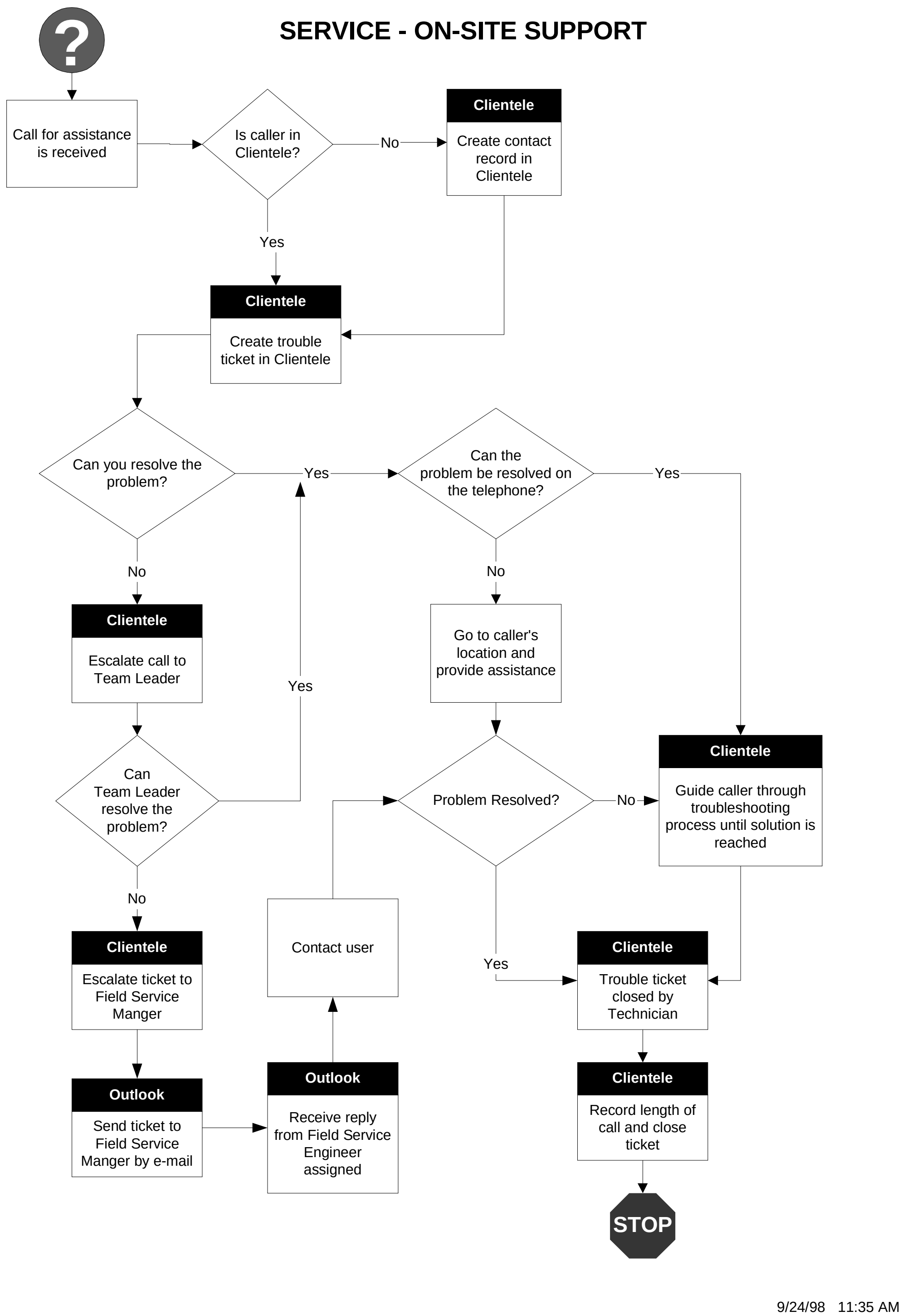
1.25.1.2. The Organization Tips Tab



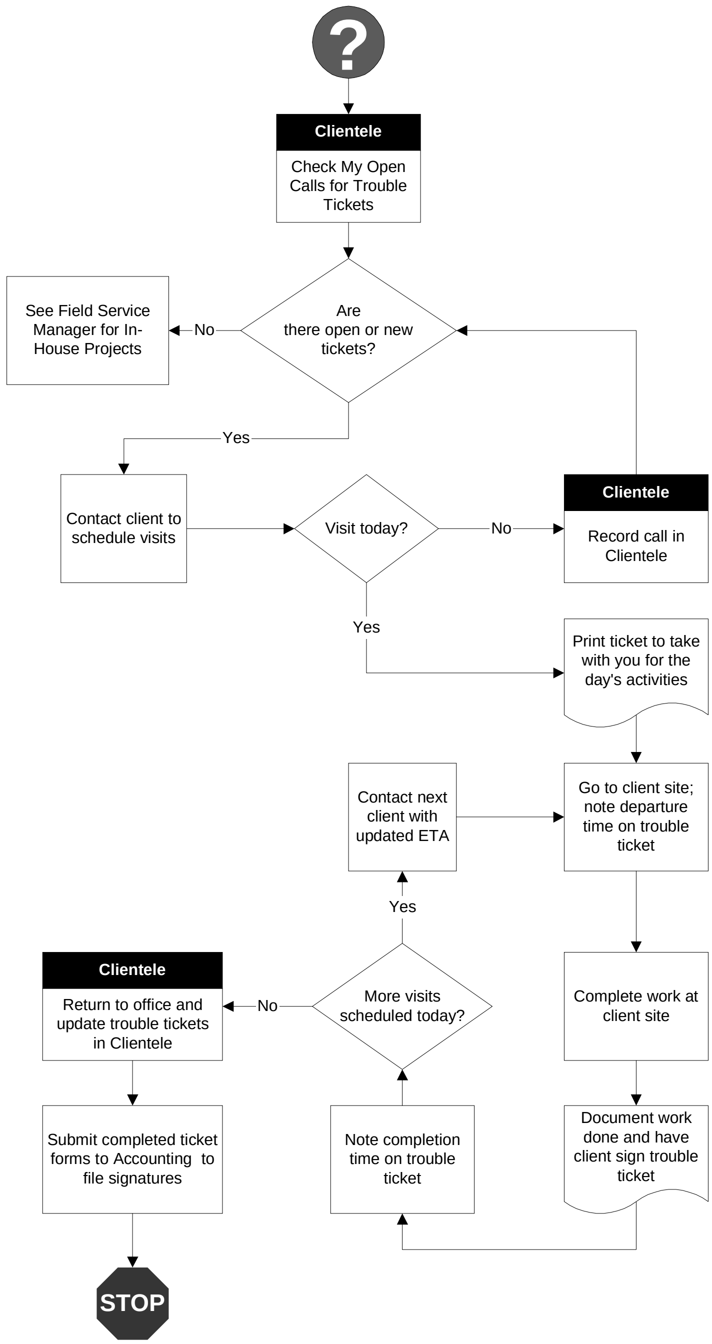
Organization Tips are information about a competing company

Field	Description
Product	Automatically filled in from the General Tab
Organization	Automatically filled in from the General Tab
Modifications	Automatically updated by Clientele with the User ID, date and time of the user making the changes.
Type	Categorizes the tip
Summary	Brief description for searching on
Notes	Details regarding a competing company

Procedure Flow Charts



SERVICE - FIELD SERVICE



9/24/98 11:48 AM

Name:	Date:
Customer:	Department:

WEEKLY ON-SITE ACTIVITY REPORT

1. What was the most satisfying support solution I provided last week, who was the end user, and how did that affect the customer?

___

___

2. What was the most difficult support assignment, who was the end user, and how did I arrive at a solution, or how was it escalated.?

___

___

3. What project work was scheduled last week. Did it get finished? What projects are scheduled for the coming weeks?

___

___

4. What additional software/hardware tools would help you complete your assignments more efficiently?

___

___

5. Has anyone mentioned anything related to the longevity of your current assignment? What overall complaints-if any have you heard about BEC

___

___

6. What additional sales opportunities exist?

   New projects: ______

   Potentially requiring more on-site support: ______

   Roll-outs/upgrades: ______

   Hardware purchases: ______

   Software purchases:______

___

7. Have you EXCEEDED the expectations of the customer for the week?

___

___

This space is for you to give some thoughts on how BEC is working. Please use this space to put suggestions, comments, ideas, “What if…”, “How come…”, etc… Problems can not be improved unless you take the time to express your feelings. Here is your chance for this week:______

___

___

___

___

Fax this form back to Todd Smith at BEC. The Fax number is (202) 331-9766
Questions can be directed to Todd at (202) 496-2151

Name:	Date:
Customer:	Department:

	TOTAL	OPEN	CLOSED	% CLOSED
Desk Top App. Support				
Printer Related				
Peripheral Related				
MS Server Related				
Netware Server Related				

Total Number Of Tickets Or Calls For This Week: ____________

Total Number Open For This Week: ____________

Total Number Closed (Percentages) For This Week: ____________

Fax this form back to Todd Smith at BEC. The Fax number is (202) 331-9766
Questions can be directed to Todd at (202) 496-2151

Support Call Reports

The following reports are available from the Call Reports form. All reports will prompt for start and end dates and list all calls within those dates.

- All Support Calls by Organization and Category

BEC Technology Solutions

Support Calls by Category for Krupin, Greenbaum & O'Brien

Call #	Date	Summary	Priority	Assigned To	Name	Product	Status
Other Activities							
738	11/13/98	PCLAW is double-posting again	3	TRAYLORJ	Michelle Planty	Move	Hold
Total Calls for Other Activities: 1							
Desktop OS Support							
1036	12/3/98	Cannot find ClipArt; file transfer issues; app install prob	3	TRAYLORJ	Michelle Planty	OSSupt	Closed
1043	12/3/98	Needs help synchronizing C. Pass's Palm Top with PAB	3	TRAYLORJ	Michelle Planty	OSSupt	Closed
1178	12/10/98	Upgrade IMMForms to version 2.5	3	ANDONII	Michelle Planty	OSSupt	Hold
Total Calls for Desktop OS Support: 3							
Server Support							
612	11/6/98	Remote user cannot get her modem to work	1	NUSINOVICHA	Michelle Planty	Citrix	Closed
656	11/9/98	Wyse terminal problems (2)	3	NUSINOVICHA	Michelle Planty	Citrix	Closed
732	11/13/98	Wants advice re WinFrame terminals	2	COOPERL	Michelle Planty	Citrix	Closed
786	11/17/98	CGP is missing the "Main" box in program manager	1	NUSINOVICHA	Michelle Planty	Citrix	Closed
814	11/19/98	Missing or incorrect Personal Address Book	3	NUSINOVICHA	Michelle Planty	Exchange	Closed
1527	12/31/98	Need help re WinFrame remote Access setup	1	NUSINOVICHA	Michelle Planty	NTSupt	Open
Total Calls for Server Support: 6							
Total Calls for Krupin, Greenbaum & O'Brien: 10							

- All Support Calls by Organization and Group

BEC Technology Solutions

Support Calls by Group for Prince William County

Call #	Date	Name	Summary	Priority	Assigned To	Category	Product	Status
Help Desk Group								
714	11/13/98	Patty Hattwick	Outlook Calendar will not take appointments	1	ANDONII			Closed
Total Calls for Help Desk Group: 1								
OTFSS\Telecommunications								
1078	12/1/98	Brian Patterson	Telemate evaluation project	3	TRAYLORJ	AppSupt	AppSupt	Open
1038	12/3/98	Brian Patterson	Rebuild County Internet server	1	ANDONII	ServerSupt	NTSupt	Closed
1040	12/3/98	Brian Patterson	Apply latest hotfixes to Raptor firewall at Owens	3	TRAYLORJ			Closed
1042	12/3/98	Brian Patterson	Create local tunnel to pass SNMP	3	TRAYLORJ	ServerSupt	NTSupt	Closed
1097	12/7/98	Don Schaller	Win95 workstations bluescreening during login	3	TRAYLORJ	OSSupt	OSSupt	Open
Total Calls for OTFSS\Telecommunications: 5								
Total Calls for Prince William County: 6								

- All Support Calls by Organization and Priority

BEC Technology Solutions

Support Calls by Priority for Rogers & Wells

Call #	Date	Summary	Assigned To	Name	Category	Product	Status
Priority: 1							
1445	12/23/98	4SI printer jam	WOODF	Charles Omstead	HWSupt	PrintProb	Closed
Total Priority 1 Calls: 1							
Priority: 2							
569	11/4/98	1-HP IIISI /9-H 2-HP IIID /10B	WOODF	Ron Andrews	AppSupt	Printing Problem	Closed
608	11/6/98	Printer 5SI (10P) is squicking	WOODF	Charles Omstead	BEC	Printer Service	Closed
609	11/6/98	Printer 4SI (8P) is paper jamming	WOODF	Charles Omstead	BEC	Printer Service	Closed
Total Priority 2 Calls: 3							
Total Calls for Rogers & Wells: 4							

- All Support Calls by Organization and Status

BEC Technology Solutions

Support Calls by Status for Krupin, Greenbaum & O'Brien

Call #	Date	Summary	Priority	Assigned To	Name	Category	Product
Closed							
612	11/6/98	Remote user cannot get her modem to work	1	NUSINOVICHA	Michelle Planty	ServerSupt	Citrix
656	11/9/98	Wyse terminal problems (2)	3	NUSINOVICHA	Michelle Planty	ServerSupt	Citrix
732	11/13/98	Wants advice re WinFrame terminals	2	COOPERL	Michelle Planty	ServerSupt	Citrix
786	11/17/98	CGP is missing the "Main" box in program manager	1	NUSINOVICHA	Michelle Planty	ServerSupt	Citrix
814	11/19/98	Missing or Incorrect Personal Address Book	3	NUSINOVICHA	Michelle Planty	ServerSupt	Exchange
1036	12/3/98	Cannot find ClipArt; file transfer issues; app install prob	3	TRAYLORJ	Michelle Planty	OSSupt	OSSupt
1043	12/3/98	Needs help synchronizing C. Pass's Palm Top with PAB	3	TRAYLORJ	Michelle Planty	OSSupt	OSSupt
Total Closed Calls: 7							
Hold							
738	11/13/98	PCLAW is double-posting again	3	TRAYLORJ	Michelle Planty	Miscellaneous	Move
1178	12/10/98	Upgrade IMMForms to version 2.5	3	ANDONII	Michelle Planty	OSSupt	OSSupt
Total Hold Calls: 2							
Open							
1527	12/31/98	Need help re WinFrame remote Access setup	1	NUSINOVICHA	Michelle Planty	ServerSupt	NTSupt
Total Open Calls: 1							

- All Support Calls by Organization and Technician

BEC Technology Solutions

Support Calls by Technician for Infotech Strategies

Call #	Date	Summary	Name	Category	Product	Priority	Status
ANDONII							
897	11/30/98	NAT administration on Podesta router	Pamela Fandel	NetAdmin	NetAdmin	3	Closed
Total Calls for ANDONII: 1							
TRAYLORJ							
921	11/30/98	Infotech server install project	Pamela Fandel	BEC	Services	3	Closed
Total Calls for TRAYLORJ: 1							
Total Calls for Infotech Strategies: 2							

- All Support Calls by Organization and User

BEC Technology Solutions

Support Calls by User for Prince William County

Call #	Date	Summary	Priority	Assigned To	Category	Product	Status
Patty Hattwick							
714	11/13/98	Outlook Calendar will not take appointments	1	ANDONII			Closed
Total Calls for Patty Hattwick: 1							
Brian Patterson							
1078	12/1/98	Telemate evaluation project	3	TRAYLORJ	AppSupt	AppSupt	Open
1038	12/3/98	Rebuild County Internet server	1	ANDONII	ServerSupt	NTSupt	Closed
1040	12/3/98	Apply latest hotfixes to Raptor firewall at Owens	3	TRAYLORJ			Closed
1042	12/3/98	Create local tunnel to pass SNMP	3	TRAYLORJ	ServerSupt	NTSupt	Closed
Total Calls for Brian Patterson: 4							
Don Schaier							
1097	12/7/98	Win95 workstations bluescreening during login	3	TRAYLORJ	OSSupt	OSSupt	Open
Total Calls for Don Schaier: 1							
Total Calls for Prince William County: 6							