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White Paper

The Costly Gap in Enterprise Contact Optimization

**Quickly and inexpensively solve problems
with contact data that are often overlooked.**

What does inability to reach employees cost your organization every day?
Which platform is best suited to solve this problem?

Executive Summary

The purpose of this white paper is to outline Enterprise Contact Optimization (ECO), its benefits, and the type of platform needed to provide it on a daily basis.

ECO is defined as 'the acquisition, combination, management, and frequent, full dissemination of the most accurate and complete superset of contact information possible'. ECO is vital to firms faced with the challenge and daily upkeep of databases of millions of employee contact records. A company with 1,000 employees would typically have about one million contacts spread across the mailboxes of these employees. If each contact has ten unique phone and text fields, there are 10 million pieces of information to manage, and 10 million opportunities for errors.

Governing contact data is becoming increasingly difficult for organizations. Frequently changing contact data quickly renders an organization's GAL (Global Address List) ineffective and obsolete. While the majority already acknowledges this, they don't yet realize that this is just part of the struggle associated with contact optimization. Where their employees fail to effectively maintain the contacts in their mobile device address book, the magnitude and severity of the problems associated with ECO are multiplied. Organizations have yet to fully recognize the importance of ensuring that these mobile device address book contacts are accurate and correct.

Everyday, wireless device users rely on their address book contacts; this dependence is painfully clear when an urgently needed team member can't be reached. Regaining and maintaining control of this contact data is imperative to an organization's success. To effectively compete in today's aggressive market, organizations need an efficient means for employees to access critical contact data on their mobile devices to ensure they can reach their people, no matter what. Employee intercommunication is essential to business productivity. Gaps in contact data are merely costly in normal times, but can be life threatening in more urgent situations.

These communication gaps can be easily and inexpensively closed via the implementation of an ECO technology. ECO solutions can deliver 24 / 7 availability of accurate and correct employee contacts, facilitate continuity of employee intercommunication, streamline business procedures and contribute to the overall organizational success. In most cases the ECO can be up and running in hours, with a payback in months, delivering increased productivity and substantial cost savings (the value of which is multiplied during an urgent or disaster scenario).

Organizations need to govern contact data; ensuring enterprise wide standards are applied from authoritative sources, and accurate contact data is aggregated and distributed to employee mobile devices throughout the organization. An automated approach that selectively maintains contacts on user devices is of vital importance to any organization.

Building an ECO solution is a significant undertaking, and you need the right software provider, with a platform that handles a wide range of data sources, new mobile devices and new user demands.

itrezzo offers a comprehensive, industry proven ECO solution with enterprise-class support that you can depend on to develop and deploy a new ECO service quickly, and integrate seamlessly to the rest of your enterprise, pushing data and documents to employees' BlackBerry handhelds or other wireless devices that synchronize with the desktop. Ongoing, it typically saves \$2 to \$3 for each dollar invested in the platform, while giving IT Support a clean and easy to administer solution to handle contact data.

Introduction

Many companies have never explored the value of end-to-end employee contact information. Despite spending millions of dollars on sophisticated new enterprise applications to handle business processes, any contact data generated is rarely made available to wireless and remote users. While capabilities may improve with new applications, global access to enterprise contact information actually becomes harder to achieve. The systems that do hold contact data often generate inconsistent, inaccurate and sometimes conflicting information.

A company's success depends on the contact data that is circulating through operational systems. When it's unreliable, this data will affect-employee, vendor, customer communication, decision-making, and runs the risk of:

- ▶ Decelerating product development
- ▶ Delaying customer support remedies
- ▶ Causing general inefficiency and increased costs through wasted man hours
- ▶ Lost sales opportunities and decreased revenues
- ▶ Employee safety issues



When richly populated and actively managed, contact records are invaluable to employee communication. Most organizations have procedures to capture new employee contact details, but rarely have reliable methods to disseminate and keep them updated. It comes as no surprise that their directory is not trustworthy. What they don't yet realize is that this is just a single element in the much wider problem of contact optimization. Where their employees fail to effectively maintain the contacts in their mobile device address book, the magnitude and severity of the problems associated with ECO are multiplied. Most organizations have not yet assessed the importance and significance in ensuring that mobile device address book contacts are accurate and correct.

How much employee contact information is there?

An enterprise with 2,000 employees may be trying to maintain and disseminate 10 pieces of data on each employee, for a total of 20,000 data points.

On the dissemination side, assume the company wants to update 1,000 wireless users with up to 20,000 discrete pieces of information. It is a challenge to maintain 20 million pieces of data, without adding duplicates or overwriting where it should not.

It is difficult or impossible for users to assure the age or validity of the contact details in their handheld address book. This is because there is rarely a single authoritative data source, and there is no method to propagate contact data to hundreds or thousands of wireless handhelds used by employees.

Large organizations rely upon a variety of silo contact information systems including Public Contact Folders, HR databases, SharePoint, SQL, CRM systems, and Excel spreadsheets, all of which hold significant amounts of contact information, such as mobile numbers, home phones, BlackBerry® PINs, Push-to-Talk IDs, email addresses, and fax numbers. In the many cases this information is missing from the GAL. This approach hinders the organizations ability to move quickly, communicate with one another effectively and keep abreast of their competitors. Ideally they would be able to automatically merge these sources of rich contact information and make contact changes perpetually available to wireless users.

Growth makes it even more difficult to keep contact information valid, and disseminate it without creating more problems.

This crucial gap in contact data leads to wasted time. The results are costly and inconvenient. In the worst case, employees go missing in action during an urgent business situation or a disaster. Often, companies do not recognize that a problem exists, and that it stems from mobile users being disconnected from their address list.

The Advent of Smartphones and ECO

When Microsoft invented Outlook / Exchange Server in the 1990s, there were two repositories in which a user could look up email addresses; their personal address book or the GAL.

Outlook desktop users relied upon both, but the GAL was instantly accessible from their desktop, while laptop users who had hundreds of megabytes of hard disk storage had a cached replica of the GAL and could work offline. These users had almost no need to add co-workers to their personal address book as these could be found in the GAL.

“There is a common misconception that BlackBerry syncs to the GAL. This is incorrect.”

The advent of Smartphone contact synchronization (starting with BlackBerry) meant that users were essentially adding co-worker contact details to their Outlook Address Book. Often they will input a wealth of details on their device, even if their co-worker data is listed in the GAL or other directories. These mobile users have control over their own data but dislike sacrificing precious work time to maintain contacts. In some cases, all of their co-workers are mimicking the same steps. In another scenario, users will manually load thousands of contacts and names into their BlackBerry local address book from their desktop. Once there, the contacts are quickly outdated, and obsolete contacts remain forever.

There is a common misconception that BlackBerry syncs to the GAL and will autocorrect anomalies between the data contained in the device and the GAL.

This is incorrect. At the time of this writing, Microsoft does not address the disconnect, nor does any wireless solution or product currently address this issue.

Since there is no auto correction of data anomalies between the BlackBerry local address book and the contacts contained in the GAL, the GAP in employee reachability grows wider and wider. It requires costly user intervention to correct the contact data contained on the BlackBerry Handheld. Examples of contact interventions are as follows:

- ▶ Phone numbers are modified that become invalid
- ▶ Office location, department and other text fields that change
- ▶ BlackBerry are not available, or have been recently updated
- ▶ Employees' leave the organization. Their contacts are obsolete but never removed
- ▶ New employees join, and these contacts are not added
- ▶ Home and mobile phone numbers are not available (these are rarely published to the GAL)

Even if the user manually adds information, it can be wrong and incomplete. In very large companies (5,000+ employees) manually adding the entire GAL to the device is impractical. Loading the GAL may not be possible if it is 15,000 users. Worse still, where they are able to manually download the GAL, it may duplicate instead of overwriting intelligently, so their address book could double or triple in size. There might be three different email addresses for one person, with no indication as to which is valid.

The most critical contact information may even be stored in a SQL Database (HR for example), or an Excel spreadsheet, MS-SharePoint, or an Exchange Public Folder. There are no turnkey solutions to get to this information to the address lists of wireless users.

Organizations need to regain control, ensuring enterprise-wide contact data quality standards are applied and accurate key business contact data is aggregated and distributed to employee mobile devices from authoritative sources within the organization. An automated approach that can selectively add and maintain contacts on the user devices is of significant value to any organization.

The problems discussed above call for the implementation of an automated contact optimization solution that could be easily and effectively managed by IT Support. This requires a comprehensive, reliable platform to keep thousands of individual address books up to date with hundreds of thousands of contact items. This is an ongoing challenge, but the solution does not have to be expensive or labor-intensive.

The industry leading ECO platform from itrezzo allows organizations to increase their employees' productivity. ECO acquires, combines, manages and fully disseminates the most accurate and complete superset of contact information possible to employee devices. Sophisticated IT support tools and an agile service delivery creates an environment that helps generate more revenue through efficient, real time employee access to complete and accurate contact information.

Enterprise Contact Optimization (ECO) Stakeholders

In most organizations IT, Human Resources, and Business Continuity staff have a stake in being able to reach fellow employees. Thus, they also have interest in ECO. Sales and Service have field personnel who must reach external contacts, will also benefit from ECO. Stakeholders typically have the following concerns:



IT

When email or any network systems are down, ECO is a make or break scenario for the Information Technology Department. If you want "All Hands" available to restore the corporate email system, inability to quickly contact the team is expensive and frustrating.

The IT department also is typically responsible for the accuracy of the organization's GAL. In many cases, IT has the job of delivering updates to each employee. Tasking the IT Department with combining contact data from other sources besides the GAL is rare. IT wants to fulfill its responsibilities with as little time and effort as possible and avoid distracting its help desk from technical issues. The IT department is the logical choice for implementing and administering an ECO platform to facilitate employee communication.



Human Resources

HR needs to be able to reach, account for, and ensure the welfare of employees at all times, while adhering to privacy policies.



Sales

The sales department almost always has employees who need contact data, but, do not need the full CRM history of every account. Licensing a CRM seat for them is not cost-justified, yet it is important to establish and maintain sales teams around current and target accounts. With caller ID reverse lookup now common in Smartphones, the importance of receiving an incoming phone call with rich customer details helps the sales person prioritize inbound phone calls and supports world class account management.



Service

Service departments often have a very similar situation, with regards to new and established accounts, as well as partners. Maintaining contact groups despite personnel changes at customer and partner sites is an ongoing challenge. Instant access to contact a customer who is mobile helps to boost service levels.



Business Continuity - Risk Manager / DR / COOP / Corporate Governance

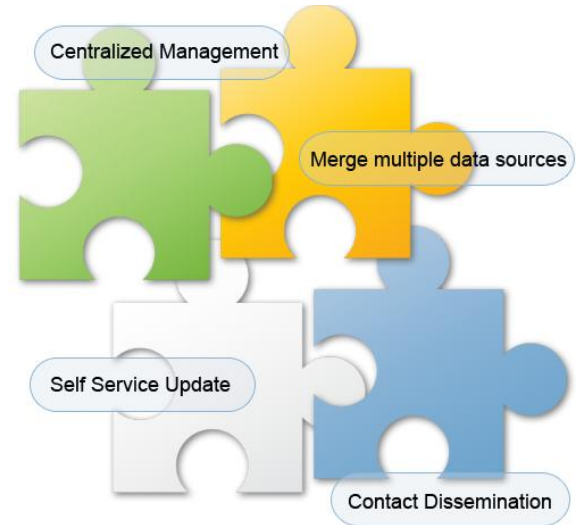
Their responsibility is to ensure organizational continuity in crisis; avoid financial loss and (in case of government) to fulfill the primary mission despite interrupted operations. This group focuses on recovery, keeping employees and infrastructure from harm. These stakeholders are driven by the need to galvanize resources and link key decision-makers and personnel during emergencies. See the itrezzo white paper: ECO and Emergency Preparedness for greater detail.

There is another group of stakeholders, which could be described as everybody. Nearly all employees stand to benefit from enterprise contact optimization. This is true in crisis, in urgent “must-connect” situations, and in routine circumstances.

Enterprise Contact Optimization (ECO): The Challenge

There are several components within the Enterprise Contact Optimization (ECO) challenge. Foremost, the majority of organizations struggle to achieve accurate and complete supersets of contact information. They often find it difficult to acquire and combine multiple sources of contact data and then keep it current. The toughest part of ECO is often the task of appropriately and effectively distributing the contact data throughout the enterprise.

When the master contact data is incomplete, inaccurate, and ineffectively propagated, communication can break down as employees become unreachable in their daily routine. This in turn leads to organizational inefficiencies and a lack of corporate governance and success.



The ECO challenge entails more than simply managing contact information in a single repository.

To achieve ECO, an organization faces the following hurdles:

- ▶ Procure and combine contact data from multiple, conflicting sources - there is rarely a single source of contact data
- ▶ Manage from 10 to 25 pieces of contact data for each employee, and keep it up-to-date and correct on thousands of handhelds
- ▶ Stop the loss of employee time in the redundant work of updating their address book
- ▶ Protect privacy appropriately. For example, the CEO's phone numbers will usually be made available only to senior management
- ▶ Push all contact data efficiently to each and every employee and handheld registered to the network
- ▶ Sustain the ability to communicate in disasters

The Landscape for ECO

Government and business usually have no single, definitive database of employees, because Human Resources, IT, and Facilities each work to maintain their own. Employees are too busy to focus on keeping their contact data current. Contact information becomes unreliable over time, and keeping it current is a major challenge. IT is best able to

Time Lost in Creating New Offshoots of the GAL

Time and expense is often wasted as groups or departments attempt to build a list for their specific purposes.

These projects may fail to complete because there is no definitive superset of employee data to draw from.

For example, a company may need to reach all remote workers by phone for an HR initiative.

In many organizations, it would turn out there is no complete, current list of their home office and cell phone numbers.

deploy and administer an ECO solution for maximum efficiency and cost savings.

The organization must track growing numbers of mobile devices, with smart phones rapidly becoming a larger percentage of them, many owned by the employee rather than by the employer. Smart phone usage among employees has become diverse. With iPhones and Android-based phones; it is no longer a BlackBerry monopoly. Organizations tend to switch handhelds and carriers, sometimes causing device contact details to change.

CRM systems are fairly high-cost, and seats difficult to justify for some field and other employees who may only need updated contact info (from the source CRM system) on customers, prospects or partners.

Organizations that have implemented message broadcasting solutions in recent years, find themselves restricted by inaccurate directories. They need correct contact information to broadcast effectively to employees. Getting employees to keep this information up to date takes enormous corporate discipline.

Not realizing the consequences of unmanaged enterprise contact data, all too often there is no enterprise wide contact governance. Many business requests for this data go unanswered. Occasionally, there is an endeavor to aggregate and distribute key business contact so that a single authoritative source is available. However, there is still no easy method to get this authoritative data to employee mobile devices. What often reaches the employee is unusable at the mobile address book.

With this in mind, an automated, controlled approach that selectively adds authoritative contacts to user devices is of vital importance to the success of any organization. When ECO brings individual address books to a state of completeness and accuracy, value is created for the stakeholders. Synergistically, the value and importance of contact optimization also goes up as organization size increases.

The following everyday scenarios support the need for a proven and robust ECO Platform:

An employee e-mails his colleagues to inform them: "My contact details have changed. Please update your address book." Every time this occurs, productivity is lowered and time is lost. If the e-mail reached 80 people, multiply the cost by 80 to gauge the cumulative impact. Most recipients never make the update, and at some point in the future may have trouble tracking down their colleague. Those who do update disrupt their work pattern and can introduce errors into a task that should be automated.

A star sales engineer was recently given a new smart phone while on field assignment. He is needed urgently to resolve a product support issue before a crucial sales meeting. Millions of dollars are at stake, but the engineer cannot be reached as his new cell phone number never made it into the company directory.

Inadequate Approaches to ECO

Many organizations in both the government and private sectors have approached the challenge of managing contact information, and reaching employees, through a variety of methods. These piecemeal approaches have drawbacks in normal working circumstances, which are magnified in an urgent situation.

Frequently, the IT department updates contact data in the GAL, but it may lack contact data that resides in other databases. Moreover, GALs often have many records that are sparsely populated, with empty fields. Obsolete contacts are rarely deleted. The IT staff are highly paid relative to the repetitive work involved in updates.

Some companies send an Excel file containing the address list via e-mail. Maintaining this list is labor-intensive, and the Excel file is unsecure. The list is rarely available where most needed, in user contact folders, much less in employees' smartphones. This method does not scale well.

The HR department may send out hard copies – essentially, a phone book. This is unsecure, sometimes to the pleasure of a recruiter raiding your staff. Companies may mark it Confidential, but this is not always effective. In any case, hard copy is quickly outdated, and users with PIMs must figure out which data has changed and then enter it onto their handheld device.

The laminated wallet card is a quaint method where labor and printing costs add up. The cards may be out of date in a few days, and they do not scale well. Lost cards can violate privacy directives.

Employees often simply tell their co-workers each time their phone or e-mail changes. This means each user addresses a notification to a [sometimes large] group, with manual intervention. Recipients are often omitted by mistake, and the method does not scale.

Some companies develop their own database for employee data, but such systems are heavily upon users remembering to enter their data changes. In the absence of automated update capability, which means error-prone manual updating will be necessary. Payroll systems are sometimes used as the source of updates, but payroll rarely includes the most frequently changing data: cell phone and home phone numbers. Most systems built in-house have only 25 percent $\frac{1}{4}$ to $\frac{1}{2}$ the range of functionality of an ECO platform like itrezzoAgent.

Broadcast or mass notification systems are in fairly wide usage, but they usually lack efficient and effective means to keep up the accuracy of employee contact data, so it degrades over time. itrezzoAgent provides an ideal complement to such systems.

Finally, some large organizations use external, Web-based application hosted outside their firewall to retain confidential employee data. Employees are instructed via e-mail to click on a link, go to the external website, and enter PII (personally identifiable information). This has inherent risk.

Essential Features and Benefits

An enterprise contact optimization platform exists to help save money, take advantage of opportunities, free employees from tedious tasks for higher-value work, and make intra-company communication easier and more reliable. It should have the key features and capabilities outlined below, beginning with the following five high-level requirements:

Self-Service Updates and Courteous Workflow

The most efficient way to achieve accuracy in a comprehensive address book is by having each employee update only his or her own data. How a system goes about requesting the update will impact how employees react.

Only information that has changed should be requested. Automatic reminders should skip employees who have already supplied their updates. This courteous workflow increases the completeness of responses.



1. The platform selected should cost-justify itself.

An ECO solution should deliver value day to day, and allow a company to quickly achieve near-complete reachability for all employees.

2. An ECO solution must be a fully developed, mature, robust platform – not a point solution – and should address the full scope of the ECO challenge.

Avoid point of presence products such as handheld or desktop solutions that do not scale, are costly to deploy, requires user training, or difficult to manage centrally.

3. Existing mass notification systems must be supported.

The ECO platform should complement, or at least be compatible with existing employee contact systems.

4. The ECO system must be easily deployed.

Deployment and implementation effort should be measured in minutes or hours, not weeks or months. ECO requires a multi-

faceted platform, not a point solution since it has to accommodate multiple data sources, numerous modes of communication, and all major handheld devices.

5. Contact optimization can encompass external contacts.

Partners and customers are often on the *must-be-reachable* list for sales and service personnel. It is particularly useful for a contact optimization platform to complement a CRM solution by pushing updated contact info to field personnel.

Checklist of Key ECO Features and Operations

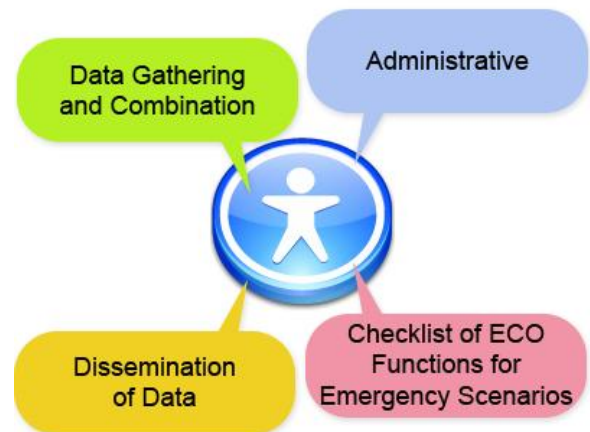
To govern contact data and optimize it across the enterprise, the ECO solution chosen should perform all of the following functions:

Data Gathering and Combination

- ▶ Draw from multiple directories, databases, files, and user updates to establish and maintain a central superset of contact information
- ▶ Intelligently combine and reconcile data from those multiple sources, resolving conflicts and avoiding duplications.
- ▶ Send automatic reminders to users to update their own contact data
- ▶ Intelligent follow-up to ensure employees do not slip through the update process
- ▶ Automate the gathering of data wherever possible
- ▶ Cut the burden on each employee to a sole task: updating his/her own unique contact data
- ▶ Intelligently preserve existing user contacts when they are updated. Users sometimes have unique and private information not available in a central database.

Administrative

- ▶ Immediate deployment, with zero software to install and maintain on handhelds; solution is server-side only.
- ▶ Best handled by IT, but with no burden on IT.
- ▶ Easy coexistence with other applications.
- ▶ Centralized administrator establishment of mandatory contact lists, including groups already defined in Active Directory, to which each set of employees will belong.
- ▶ Administrator can set privilege levels and access to protect employee and executive privacy to conform to the organization's privacy standards.
- ▶ Automatically include any handheld registered to the network by an employee or external contact.
- ▶ Allow administrators to monitor the system, obtain status and statistics for specific users.
- ▶ Enable Restore Contact and System Restore to correct erroneous changes.



Dissemination of Data

- ▶ Reduce the time spent by each employee to keep current on his/her key contact people, while increasing data accuracy.
- ▶ Push / disseminate the data which has changed, to all employees authorized to receive it, without any action on their part.
- ▶ Update incrementally (not the entire database each time) to lighten network loads.
- ▶ Update each user only with the groups of contacts to which he or she should have access, to avoid overflowing their handheld with thousands of unnecessary contacts.
- ▶ Integrate contacts with existing user address books

On the last point, secondary and tertiary address books create challenges for both users and IT support staff. Multiple address books do not constitute a scalable approach.

Checklist of ECO Functions for Emergency Scenarios

ECO becomes even more vital in a disaster situation. If email and voice communications are fail, the only remaining modes could be SMS, BlackBerry PIN-to-PIN, and Push-to-Talk. Therefore, the ECO platform should:

- ▶ Be ruggedized and reliable in a crisis situation.
- ▶ Enable broadcast and/or employee-to-employee communication via SMS, PIN-to-PIN, or via PTT.
- ▶ Equip employees the current, instantly accessible emergency contact data, on their handheld.
- ▶ Support horizontal communication between senior executives.
- ▶ Provide reverse lookup to identify callers and message senders.

For more on **itrezzo** for COOP/BC COG/CON disaster recovery, please request the white paper on ECO and Emergency Preparedness.

A Proven, Cost-Effective Solution

The itrezzoAgent EPS application is a unique, groundbreaking ECO platform that delivers a new class of contact optimization solution for the entire organization. Offering substantial savings in both time and money, it supports DR / BC responses, increases data accuracy, boosts efficiency and makes intra-company communication easier. This server-based technology resides inside the firewall at hundreds of major corporations and government agencies and requires zero client software to install or maintain.

Every night, itrezzoAgent ECO updates millions of contacts, following a set of *carefully designed, developed, tested and refined rules that are safe for the largest enterprises*. This rules-based infrastructure can be configured to meet the specific needs of the organization and is adaptable in accordance with changing business needs. It enables companies to maximize their equipment investments by coordinating and optimizing resource usage at all times.

By contrast, where companies have deployed hastily programmed homegrown point solutions, all too often they encounter a variety of problems with servers overloading and – more troubling – Incorrect mingling of data from different sources.

ECO allows the organization to implement and tailor simple operations, or complex automated multi-step moves to meet the requirements associated with each identified business process.

The itrezzoAgent ECO platform does not create security vulnerabilities. Wireless Email solutions such as BlackBerry Enterprise Server or Microsoft ActiveSync provide transport level encryption. The itrezzoAgent ECO platform is an application that leverages existing encrypted information systems and is in use at DOD installations where security standards are enforced.

itrezzoAgent EPS Functionality

itrezzoAgent EPS performs three main functions: it creates a highly accurate, comprehensive superset of contact data, pushes the right information to all employees, and offers alternate means to communicate if voice telephony and email are down. This platform optimizes contact data and employee reachability as follows:

- ▶ Pulls contact data from multiple sources in the company, which can include nearly all SQL



itrezzoAgent EPS follows a set of carefully designed, developed, tested and refined rules

Safe for the largest of enterprises, this rules-based infrastructure can be configured to meet the specific needs of the organization and is adaptable in accordance with changing business needs.

- ▶ databases, Microsoft Exchange, Active Directory, BlackBerry Enterprise Servers, SharePoint, CSV, Access, and flat files and combines the data intelligently.
- ▶ Combines and reconciles data from multiple sources, giving priority to the sources ranked as more likely to be correct. Usually, administrators set the ranking, with the goal of keeping the superset accurate.
- ▶ Automatically extracts the PIN number (from each BlackBerry that is registered to an employee) as well as PTT IDs, and device phone numbers.

To keep the data current, while removing the maintenance burden from IT, itrezzoAgent EPS also provides:

- ▶ Intelligent workflow to obtain self-service updates (from every employee) of their contact data
- ▶ Diplomatic follow-up, sending reminders only to the employees who have not provided their update, and asking them only for the specific data items still needed.
- ▶ Administrative capability to rank data sources by their relative accuracy and dependability; the system then reconciles the sources and any conflicting data
- ▶ Protection for the privacy of contact data where needed, allowing an administrator to set – for example – which employees can see the CEO's home phone number
- ▶ Mandatory contact lists and nested contact groups (set by administrators), emergency contact data, and emergency plan documents which can be pushed to smart phones and stored in local cache memory for instant, anytime access even if networks fail.
- ▶ Automatically pushes contact data efficiently to each employee's contact folder, sending only the changed data, to minimize network and handheld load.
- ▶ Automatically updates BlackBerry and other handhelds from Outlook when they are next cradled.

These functions allow itrezzoAgent EPS to support business continuity and sustained communications during and after a disaster or emergency. itrezzoAgent EPS ensures that every employee has the most up-to-date contact information possible. Any authorized administrator or user can issue an email or SMS blast to all employees, or to select groups. Even if the BlackBerry enterprise server is not working, a PIN Blast can be sent to all BlackBerry users.

In addition, itrezzoAgent EPS can encompass contact data for individuals outside the company, including current and prospective customers. For Sales and Service, itrezzoAgent EPS can use CRM databases as sources, showing all appropriate prospects / customers to a sales or service rep for that territory. This gives field engineers and sales teams' up-to-date customer information by licensing an **itrezzoAgent EPS** seat, at a fraction of the cost of a CRM seat.

The itrezzoAgent EPS Administrator Console is comprehensive and enables the operator to: add and remove users to the service; setup mandatory contact groups and privacy controls, schedule updates from data sources, rank data sources for trustworthiness, control data push functions, configure various data sources and schedule Self Service Update reminders and receive user statistics. It can be run on the itrezzoAgent Server, or on a remote workstation.

The Tested, Robust Platform for ECO

ItrezzoAgent EPS is a revolutionary class of product that offers a unique and fresh approach to overcoming the challenges associated with Enterprise Contact Optimization. It delivers a mature, third-generation enterprise contact optimization platform, with blue-chip reference customers and has a proven history handling the contact data for millions of employees, every night, inside the firewalls of both government and enterprise.

An estimated two percent of the available market has already put the “missing piece” for ECO into place. These early-adopter government agencies and corporations saw the need to close the reachability gap. In some cases they were spurred by disaster recovery mandates and corporate governance imperatives – or as an outgrowth of a Sales/CRM solution.

For the other 98%, a typical scenario is that their DR / BC task group focused first on database backup and the ability to continue completing transactions despite disasters. Many in this category have now turned attention to ensuring they have the right contact data to sustain communication in emergencies.

The growth of smart-phone adoption has steadily raised the potential value of the **itrezzo** ECO platform. Smart phones distributed by companies to their employees are only part of the story. IDC estimates that by 2013, employee-owned smart phones will account for over half the business smart phones shipped. Organizations realize they must accept – and capitalize on – employees’ willingness to use their own smart phone for business purposes.

Maturity and Long-Term Development

ItrezzoAgent EPS was conceived from the start as a platform that would be given progressively expanding capabilities. The platform has been proven over a period of years in corporate and government usage, while following a logical development path. It accesses contact data from a steadily widening pool of data sources, and exploits a growing range of handheld devices. While **itrezzo** has continued to grow its functional capabilities, its built-in intelligence and the self-service update workflow have been progressively enhanced. Since 2003, **itrezzo** has steadily developed valuable integration between itrezzoAgent EPS and leading third-party message broadcast applications. At the same time, **itrezzo** has provided forward migration paths for its users, for example from public folders to SharePoint.

Future Development Path for itrezzoAgent EPS is Clearly Defined

Development continues aggressively as **itrezzo** continues to add integration for new smart phone technology while capitalizing on the features of iPhone, iPad, Android, and Windows Mobile devices. In addition, more data sources, including CRM applications and HR Systems will be accepted as data sources.



Business Case for itrezzo

By continually saving bits of time for many employees, itrezzoAgent EPS normally pays for itself in 10 months or less. Its ROI skyrockets when a disaster scenario occurs, but becomes impossible to calculate. What is the value of being able to deliver a life-saving warning via SMS/PIN Blast to hundreds of employees?

Conversely, what is the cost to a government agency if a director cannot be reached for a time-critical decision on protecting data sites from an impending flood? Taking another scenario where voice, email and corporate BlackBerry servers are knocked out, without itrezzoAgent EPS the investment in message broadcast applications might be without value.

Conclusion

Enterprise contact optimization (ECO) seeks to deliver the following:

- ▶ Achieve the highest possible completeness and accuracy of contact data with minimal IT burden.
- ▶ Enable easier and more efficient contact between employees at all times.
- ▶ Saves bits of time continually for large numbers of employees.
- ▶ Leverage the value of CRM systems at little incremental cost.
- ▶ Maximize an organization's ability to communicate through disaster situations.

While meeting the criteria above itrezzoAgent EPS has key advantages not found in other software. Tactically, it leverages the functionality of BlackBerry® handhelds for emergency communications and accurate updates, and extends the value of CRM to more personnel at 1/10 the cost of additional CRM seats. Strategically, it brings an intelligent, well-conceived approach to improvement and management of the organization's address directory on all types of Smartphones.

With a long track record of excellent performance with major government and corporate organizations, itrezzoAgent EPS addresses a wide range of contact optimization and business continuity issues. It adds value to, and coexists smoothly with CRM, message broadcast, and BC/COOP/emergency solutions. The **itrezzoAgent ECO platform** makes day-to-day operations more cost-efficient.

The maturity, reliability, simplicity and affordability of the itrezzoAgent EPS platform, its reduction of the support burden upon IT, its effectiveness in crises and its benefits during routine times, make a strong case for its adoption. This is especially true for larger organizations with heavy smart-phone / BlackBerry® usage.

Employee reachability in emergencies as well as routine times can be optimized efficiently, saving money and reducing the burden on IT and every employee. Once IT has the green light to solve the problems associated with contact data, and the budget is designated, the **itrezzo** ECO platform deploys within minutes or hours, and usually achieves payback within nine months. It typically saves two to three dollars for each dollar invested in the **itrezzo** ECO platform, while giving IT a clean, easy to administer solution to support inter-employee communication.

About itrezzo

Since 2001, **itrezzo** has developed enterprise-grade infrastructure and applications that solve the problems of enterprise contact optimization (ECO) and sustain communications during emergency situations. One of the first third-party developers for BlackBerry, **itrezzo** is trusted with servers deployed behind the firewall of over 1000 companies and government agencies, including the Department of Justice, Department of Veteran Affairs, Department of the Treasury, the City of Berkeley, Argonne National Laboratory, The Federal Communications Commission, US Army Corp of Engineers, Monster Cable, The Carlyle Group, HBO, Lockheed Martin, RE/Max, Shell Oil, and The Blackstone Group.

For more information, visit www.itrezzo.com.