

Corporate Meeting Solutions - Meeting Management System Fortune 100 Financial Institution



Blending Creativity and Technology to Deliver Better Business Solutions

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- Introduction
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- Gap Analysis
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- Benefits
- Product Walkthrough



eDynamic's Solution - Francesca

Francesca: It is a Web based application designed to allow Meeting Managers/Planners to successfully manage and execute meetings without the user of any manual worksheets.

Prior to the inception of Francesca, Meeting Budgets were being created using Excel spreadsheets, which was a very slow and tedious process as it was a completely manual process. As a result there was severe inefficiency and frustration with the Meeting Managers and clients. With Francesca's online budgeting component, Meeting Managers are able to create, share and submit budgets instantaneously.

As per the requirements of the client, eDynamic architected a customized budgeting solution called Francesca which replaced their earlier business management solution, Solomon. As their earlier tool was quite generic and was not able to fulfill the specific demands of the client, eDynamic came up with a dynamic, real-time and user-friendly tool, which fulfilled all the customer needs and helped in identifying new opportunities of growth.

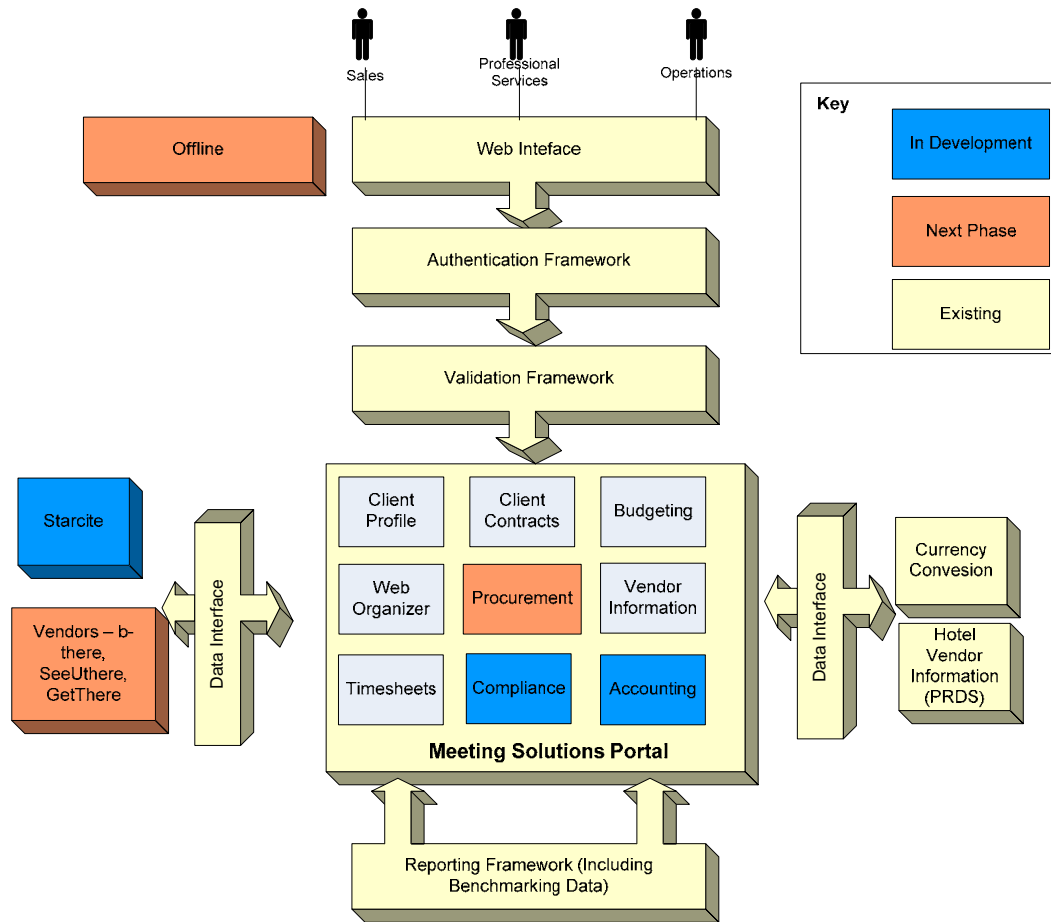


eDynamic Solution - Francesca Overview

- Web-based “dashboard” with a customized “homepage” geared to the individual user
- whether planner, team leader or MPS
- Backend Integration with Solomon to provide the users with access to the historical data so that users do not have to access two separate data sources
- Data entered is controlled by a client profile allowing for customization based on client perimeters
- Calendar tools allow for tracking to-do's and deadlines for each program
- Budgeting tool allows planners to calculate budgets accurately without manual worksheets
- On-screen “snap-shot” of status of assigned programs
- Alerts and Notifications engine built into the system provides better tracking and auditing capabilities



eDynamic Solution - Francesca Overview



- Online, secure and single point of access for all users and information
- An offline version that synchronizes with the online version is being considered for those offices that do not provide access to client network
- Standardized validation of all data
- Client Profile - Manages all client information
- Contracts - Drive budgets based on client contracts (Fully Managed, DOE, etc)
- Budgeting - Allows users to create budgets for programs. Vendor information including Client Preferred and Fortune 100 Financial company Preferred , and currency conversions available
- Vendor Information - Integration with PRDS provides vendor information
- Web Organizer - Integrated into the program planning to ensure all activities are carried out on schedule
- Compliance - Portal checks to see if client preferred vendors are chosen. Sarbanes Oxley compliance is next on the Agenda
- Live and Online Robust Reporting layer
- Starcite Integration to prevent rekeying of data
- Other integrations as part of continuing development plan



The Challenges

- Manual Processes to push data into Solomon
- Current Solomon staff resources were at capacity and with the (then) current rate of business growth plus additional data needs, would exceed capacity by mid-year 2005
- Process inefficiencies were causing gaps in data gathering
- Rework loops in current processes
- Limited data validation which was impacting quality of data
- Data gathering processes were not standardized
- Data was not gathered in “real-time”
- No checks and balances were in place to track slippages and delays



Requirements

- A “real-time” and user-friendly way to enter data for Solomon
- Tools to organize and manage meetings in progress such as to-do calendar and reminder functions linked to the program
- Ability to see a “flash” report of status of meetings based on “real-time” data.
- Tools to calculate budgets including currency conversions
- Capability for leaders to access complete data on their team workloads in real time.
- Alerts and Notifications engine to track slippages and delays



Gap Analysis

Capability	Gap	Solution
Efficiency	<ul style="list-style-type: none"> Budgets were created in Excel spreadsheets, not the right medium to create budgets, so the process was slow and tedious. This caused severe inefficiency and frustration with the Meeting Managers and clients. Budgets submitted into the system would be approved and available a few days later 	<ul style="list-style-type: none"> Easy to use online budgeting component that allows the Meeting Managers to create, share budgets with clients and submit budgets Approved budgets would then be available instantaneously
Non Availability of data	<ul style="list-style-type: none"> Meeting managers did not have easy access to important information needed to plan meetings such as hotels/vendor information, client preferred vendors, currency, client information etc 	<ul style="list-style-type: none"> All client preferred and Fortune 100 Banking & Financial company preferred vendors available in the application Live currency conversion Detailed client profiles available
Seamless availability of data across vendors	<ul style="list-style-type: none"> Since planning meetings required access to other vendor tools, clients were complaining that their team had to access various tools to get data and in many cases the same data 	<ul style="list-style-type: none"> Integration with Starcite is underway Onvantage and RFP Express will be considered shortly
Reporting	<ul style="list-style-type: none"> All reports were manually created. The data had to be fetched from multiple sources. Thus, the report creation process was not only slow. Since data intelligence is critical in your business, client was not able to provide satisfactory reports to clients on time, and in the depth that clients would've liked, and that led to customer dissatisfaction. 	<ul style="list-style-type: none"> A robust online reporting solution that will provide live and ad-hoc reports
Validation	<ul style="list-style-type: none"> The existing processes led to invalid and erroneous data, which caused large problems 	<ul style="list-style-type: none"> All data being entered will be manually available
Compliance	<ul style="list-style-type: none"> Compliance with Sarbanes Oxley is a big consideration for clients. Current processes did not meet this compliance 	<ul style="list-style-type: none"> All transactions will be saved Audit trail available



Benefits

Benefit	How
Ability to grow business without increase in headcount (\$\$\$\$ Primo Ultimo!)	Less “touch” of data = able to process more data
Elimination of time-lag for data capture	Data going into system in “real-time” means better, faster, more up-to-date information
Increased confidence in data	Data validated based on client-driven perimeters
Increased efficiency for planners	Gives them better tools to manage programs
Increased productivity	Automation of data loading decreases time wasted pushing paper
Increased employee satisfaction	Better tools = happier employee
Better management tools	Gives team leaders and managers tools to gage staffing needs based on workloads



Benefits - Data Evolution

Form/Data processed	2003	2005	With Francesca
Air/Land form (PSF)	4 days	2 days	Real-time
# processed (week)	100	200	25K
Budget Template - approx time to fill out	Greater then 60 Min	Greater then 60 Min	Less than 30 Min
Budget Loads	1 week	1 day	Real-time
New Vendors	3 days	1 day	Real-time
Client Profile	No data captured	Now capturing but limited usability	Able to use for reporting/reference
Client-customized UDF's	Office grids	Pushed with PSF	Real-time
Commission tracking	Manual Excel grid	Access Database/with data from Solomon	Real-time consolidated reporting



The software was architected with an emphasis on Globalization and Flexibility

- Modular Approach to various features
- Currency Tool
- Global Tax Module
- Ability to change Base Currency
- Alerts Module

If the meeting planning business processes are the same as the US counterparts, we envision the following major changes

- Accounting System integration
- Base currency change
- Local taxation policy integration



Solution Functionality

Client Setup - Client Listing

→ My Clients

[Search All Clients](#)

New Client

→ My Client Listing

Client Name <small>▲</small>	Country Name	Status	Updated Date	Client Contact	Action
ABB Industries	United States	Active	09/17/2007	Dana Raue	
Aditya Birla Group	United States	Active	09/17/2007	Tajinder Singh	
Advanstar Inc	United States	Active	09/12/2007		
AEFA	United States	Active	09/12/2007	Amy Riley	
AEFA Incentive Management	United States	Active	01/27/2006	Joseph Abbate	
Agencourt Biosciences	United States	Active	01/27/2006	Mary McKernan	
AGFA Corporation	Canada	Active	09/12/2007	Esther Cohen	
Alcoa Inc	United States	Active	08/30/2007		
Allergan	United States	Active	09/17/2007	Susan Marshall	
Allstream	Canada	Active	09/03/2007	Pat Cameron	

Clients 1-10 of 161 [1](#) [2](#) [3](#) [4](#) [Next >>](#)

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Solution Functionality

Client Setup - Add Client

→ Add Client Basic Information

[My Clients](#) | [Search All Clients](#)

→ Client Basic Information

All fields marked with * are mandatory

Requestor: Admin User

Amex Market Segment*	Select from List...	Client Type*	Select from List...
Client Name*	<input type="text"/>	Database*	Select from List...
Business Type*	Select from List...	Address 1*	<input type="text"/>
Address 2	<input type="text"/>	Country*	Select from List...
State/Province	<input type="text"/>	City*	<input type="text"/>
Zip/Postal Code*	<input type="text"/>	Phone* (Numeric Only)	<input type="text"/> Ext. <input type="text"/>
Fax (Numeric Only)	<input type="text"/>	Email	<input type="text"/>
Website	<input type="text"/>	Base Currency	
DK Type	Real	PRDS Client Code	<input type="text"/>

Operations Information

Cost Center*	Select from List...	Max Branch	<input type="text"/>
Air Ticketing Cost Center	<input type="text"/>	Air Ticketing Max Branch	<input type="text"/>

CMS Staff Information

Sales Person	Select from List...	Manager of Professional Services	Select from List...
Operations Manager	Select from List...	Operations Team Leader	Select from List...
Biller	Select from List...	Final Reconciliation to be Completed by	Select from List

Person to be Notified upon Setup

<input type="checkbox"/> Adele Perkins <input type="checkbox"/> Adrienne Martin <input type="checkbox"/> Alexis Willis	<input type="text"/>
--	----------------------

Submit Cancel

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Solution Functionality

Client Setup - Client Snapshot

→ Client Snapshot

My Clients | Client Snapshot | [Preview Client](#) | [Search All Clients](#)

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For Support: francescahelp@aexp.com

Deactivate

→ Status

Overall Client Status: **ACTIVE**

	Status	Next Step
Client Contact	Created	None
Contract	Completed	None
Data Profile	Not Completed	Please Complete
Account Profile	Not Completed	Please Complete
Client Required Fields	Completed	None

→ Client Basic Information

[Edit](#) | [View](#)

Client Name	ABB Industries
Client Code	ABBGP
Business	Industrial/Manufacturing
Phone	9195823222
Email	
Website	
Base Currency	USD
Cost Center	028-576-542 Mt. Laurel Operations
Max Branch	51101

→ Contacts

Client Contacts

Meeting Contacts

[Add](#) | [Client Contact Listing](#)

Contact Name	City	Country	Phone	Action
Dana Raue	Cary	United States	9195823222	

1 of 1 [More >>](#)

→ Client Required Fields

[Download Excel Sheet](#)

→ Other Information

Data Profile [Add](#) | [View](#)

Account Profile [Add](#) | [View](#)

→ Contracts

[Add](#) | [Contract Listing](#)

Contract Name	Status	Signature Date	Start Date	Expiry Date	Action
Sourcing Only - No Contract	Active		01/01/2006	12/31/2006	

1 of 1 [More >>](#)

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Solution Functionality

Client Setup - Client Preview

→ **Preview Client**

[My Clients](#) | [Client Snapshot](#) | [Preview Client](#) | [Search All Clients](#) | [Print](#)

Client Name: **ABB Industries**

Client Code: **ABBG**

[Expand All](#) [Collapse All](#)

Client Basic Information

Client Basic Information				Edit
Amex Market Segment		Client Type	Sourcing Only	
Client Name	ABB Industries	Database	AMEX USA	
Business Type	Industrial/Manufacturing	Address 1	9000 Regency Parkway	
Address 2	Suite 300	Country	United States	
State/Province	North Carolina	Company/City	Cary	
Zip/Postal Code	27511	Phone	9195823222	
Fax		Email		
Website		Base Currency	USD	
DK Type	Real	PRDS Client Code		
Operations Information				
Cost Center	028-576-542 Mt. Laurel Operations	Max Branch	51101	
Air Ticketing Cost Center		Air Ticketing Max Branch		
CMS Staff Information				
Sales Person		Account Manager		
Operations Manager	Ron Warner	Operations Team Leader	Liz Noll	
Billor	Tammy Moebs	Final Reconciliation to be Completed by		

[Clients Contacts](#)

[Data Profile](#)

[Contract Information](#)

[Client Required Field](#)

[Account Profile](#)

[Meeting Contacts](#)

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Solution Functionality

Program Setup - Program Listing

→ My Programs

[Search Programs](#)

[New Program](#)

→ My Program List

Meeting Name	Updated Date	Client Name	Program Number	Program Status	Meeting Start Date	Meeting End Date	Meeting City	Event Owner	Action
Fall Management 21	10/04/2007	Zurich NA	ZRIGP0020061867	Planning	02/22/2006	02/22/2006	Bloomington	Dawna McDonald	
Fall Management 21w	10/04/2007	AEFA Incentive Management	AFAGP0020076054	Registered	10/04/2007	10/04/2007	Saanichton	Admin User	
02 Bnch Mgrs Wkshp IV	08/21/2007	Johnson Controls	JOHGP0020060266	Proposal	02/11/2006	02/11/2006	Deerfield	Kim Pecanac	
03 Mgrs Prg Wksp IV	02/23/2006	Johnson Controls	JOHGP0020060265	Registered	03/04/2006	03/08/2006	Itasca	Kim Pecanac	
04Q05 VIP Meeting	11/10/2006	Zurich NA	ZRIGP0020061543	Planning	01/19/2006	01/20/2006	Naples or Hollywood	Margaret Marciniak	
06 Campbell National Sales	01/11/2007	Campbell Soup	CPSGP0020060587	Planning	09/25/2006	09/29/2006	Hollywood	Cathy Briggs	
06 Service Ambassador Awards	01/30/2007	Johnson & Johnson US	JSNGP0020073180	Planning	05/02/2007	05/06/2007	Cancun	Wanda Rodriguez	
07MY Buell Press Launch	07/26/2007	Harley Davidson Motor Company	HDMGP0020060667	Planning	07/10/2006	07/11/2006	Bakersfield	Michelle Grein	
100 Man Workshop	03/02/2006	Johnson & Johnson US	JSNGP0020062823	Registered	02/28/2006	03/02/2006	Miami	Nancy Muse	
103 Incentive Meetino	06/28/2006	Armstrong World Industries	AWIGP0020060040	Planning	03/30/2006	04/03/2006	Dorado	Carol Richwine	

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Solution Functionality

Program Setup - Add Program

→ Add Program Basic Information

[My Programs](#) | [Search Programs](#)

All fields marked with * are mandatory

Meeting Type*	Select from list... <input type="button" value="v"/>
---------------	--

→ Select Client & Contract

Client Name*	Select from list... <input type="button" value="v"/>	Contract*	<input type="text"/>	<input type="button" value="Preview Contract"/>
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Meeting Information

Meeting Name*	<input type="text"/>	Meeting Type	<input type="text"/>
Total Land Attendees*	<input type="text"/>	Total Air Attendees*	<input type="text"/>
Meeting Start Date*(MM/DD/YYYY)	<input type="text"/> <input type="button" value="Calendar"/>	Meeting End Date* (MM/DD/YYYY)	<input type="text"/> <input type="button" value="Calendar"/>
Meeting Country*	Select from list... <input type="button" value="v"/>	Meeting State/Province*	Select from list... <input type="button" value="v"/>
Meeting City *	<input type="text"/>	Using CMS Procurement?	No <input type="button" value="v"/>
CRS/GDS	Select from list... <input type="button" value="v"/>	Airport / Train Codes	<input type="text"/>
AMEX Cost Center	<input type="text"/>	Land DK Number	<input type="text"/>
Air DK Number	<input type="text"/>	Is Invoice Required?	No <input type="button" value="v"/>
Will there be Revenue?	No <input type="button" value="v"/>	Will there be a Commission?	No <input type="button" value="v"/>
Is Budget Required?	No <input type="button" value="v"/>	Client Currency *	Select from List ... <input type="button" value="v"/>
Amex Managed Business	Yes <input type="button" value="v"/>		

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Solution Functionality

Program Setup - Program Snapshot

→ Program Snapshot

[My Programs](#) |
 [Program Snapshot](#) |
 [Preview Program](#) |
 [Search Programs](#)

Meeting Name: **Fall Management 21**
 Client Name: **Zurich NA**
 Last Updated Date: **10/04/2007**

[New Program](#) [Deactivate](#) [Cancel Program](#)

→ Status

Overall Program Status: **Planning**

	Status	Next Step
Revenue Information	Not Entered	Please Enter
Vendor Setup	Entered	Update if Needed
Budget	Final - 3	Update if Needed
Event Team	Entered	Update if Needed
Meeting Contacts	Entered	Update if Needed
Required Fields	Not Complete 10 Out of 25 Questions Not Answered	Please Complete
Procurement Fields	Not Complete 4 Out of 6 Questions Not answered	Please Complete

→ Financial Information

Step 1: **Vendors** Step 2: Budget

[Setup | Vendor Listing](#)

Name	Code	City	State	Country	Phone	Action
Ocean Point Resort & Club	10183	Miami	Florida	United States	3059405422	

1 of 1 [More >>](#)

→ Program Notes

[Edit](#)

Program Setup

[Event Team](#)

[Edit | View](#)

Client	Zurich NA
Meeting Name	Fall Management 21
Meeting Start Date	02/22/2006
Meeting end Date	02/22/2006
Meeting City	Bloomington
Solomon Project #	ZRIGP0020061867
Land DK Number	6514001867

→ Meeting Contacts

[Find/Add Meeting Contact](#)

Contact Name	Phone	Contact Type
Judy Fox	9168612204	Hotel / Vendor
Jerry Duma	8774409592	Client
Troy Gatza	6022172214	Client
Karen Karriker	7042371058	Client
Enilda Indyk	8457326044	Client

[More >>](#)

→ Other Information

Revenue	Add View
Client Required Fields	Edit View
Procurement Fields	Edit View
Checklist Master	Edit View
Task	Add View



Solution Functionality

Program Setup - Program Preview

➔ **Preview Program**

[My Programs](#) |
 [Program Snapshot](#) |
 [Preview Program](#) |
 [Search Programs](#) |
 [Print](#)

Meeting: **Fall Management 21** Client: **Zurich NA** DK#: **6514001867**

Meeting City	Bloomington	Solomon Project #	ZRIGP0020061867
Meeting Start Date	02/22/2006	Meeting End Date	02/22/2006

[+ Expand All](#) [-- Collapse All](#)

Basic Information

Edit			
Client Name	Zurich NA	Contract	Zurich Insurance Co
Meeting Name	Fall Management 21	Meeting Type	Land Only Planning
Total Land Attendees	20	Total Air Attendees	0
Meeting Start Date	02/22/2006	Meeting End Date	02/22/2006
Meeting Country	United States	Meeting State/Province	Minnesota
Meeting City	Bloomington	Using CMS Procurement?	Yes
CRS/GDS		Airport / Train Codes	
AMEX Cost Center	028577401	Land DK Number	6514001867
Air DK Number		Is Invoice Required?	Yes
Is Land Revenue Required?	Yes	Will there be a Commission?	Yes
Amex Managed Business	Yes		

Team Members

Client Required Fields

Contact Info

Revenue

Budget

Procurement



Solution Functionality

Vendor Listing

➔ Vendor Listing

[My Programs](#) | [Program Snapshot](#) | [Preview Program](#) | [Search Programs](#)

Meeting: **Fall Management 21**

Client: **Zurich NA**

DK#: **6514001867**

Setup

Replicate

Name <small>△</small>	Vendor Code	Address1	City	State	Zip	Country	Preference	Action
Ocean Point Resort & Club	10183	17375 Collins Ave	Miami	Florida	33160	United States	Non Amex	 

Vendor Listing 1-1 of 1

1



Solution Functionality

Vendor Setup

→ Vendor Setup [My Programs](#) | [Program Snapshot](#) | [Preview Program](#) | [Search Programs](#)

Vendor Name: 1-800 Limo Ctr Vendor Code: 11407

All fields marked with * are mandatory

Currency Parameters

Base Currency	Currency	Conversion Rate	Conversion Rate Date
Base Currency	USD		
Client Currency*	USD	<input type="text"/>	<input type="text"/>
Client Currency to Base Currency Conversion*			
Vendor Currency*	Select from List ...	<input type="text"/>	<input type="text"/>
Vendor Currency to Base Currency Conversion*			
Vendor Currency to Client Currency Conversion*			

Accommodations

Fixed Amount or %	Select from List...	Room Tax 1	<input type="text"/>
Fixed Amount or %	Select from List...	Room Tax 2	<input type="text"/>
Fixed Amount or %	Select from List...	Room Tax 3	<input type="text"/>
Fixed Amount or %	Select from List...	Misc. Room Tax	<input type="text"/>
Fixed Amount or %	Select from List...	Room Service Charge	<input type="text"/>
Commission %	<input type="text"/>	Room Service Charge Taxable?	No

Food & Beverage

Food & Beverage Tax %	<input type="text"/>		
Food & Beverage Service Charge %	<input type="text"/>	Food & Beverage Service Charge Taxable?	No
Misc. Food & Beverage Service Charge %	<input type="text"/>	Misc. Food & Beverage Service Charge Taxable?	No
Commission %	<input type="text"/>		

All Other Categories

Local Tax %	<input type="text"/>	GST/VAT %	<input type="text"/>
Commission %	<input type="text"/>	State/Province Tax %	<input type="text"/>
Misc. Tax %	<input type="text"/>		
Fixed Amount or %	Select from List...	Service Charge	<input type="text"/>
Service Charge Taxable?	No		

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Solution Functionality

Budget Setup

→ Budget Listing

[My Programs](#) | [Program Snapshot](#) | [Preview Program](#) | [Search Programs](#)

Meeting: Fall Management 21

Client: Zurich NA

DK#: 6514001867

Budget ID ▾	Budget Name	Budget Status	Updated Date	Meeting Owner	Complete	Action	Lock Status
28922	Budget 2	Final - 3	11/01/2007	Dawna McDonald	<input type="checkbox"/>		
28915	Budget 2	Final - 2	10/01/2007	Dawna McDonald	✓		
28775	Budget 2	Final - 1	09/11/2007	Dawna McDonald	✓		
28709	Budget 2	Draft	09/11/2007	Dawna McDonald			
28708	Budget 2	Draft	09/11/2007	Dawna McDonald			
28658	Budget 1	Draft	09/07/2007	Dawna McDonald			
27049	Budget 2	Accepted	09/11/2007	Dawna McDonald	✓		

Budgets 1-7 of 7 **1**

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