

eDynamic - IT Services & Solutions



eDynamic

Blending Creativity and Technology to Deliver Better Business Solutions



IT Services & Solutions

About eDynamic: eDynamic (www.edynamic.net) is a Global Technology, Interactive Marketing Services & Consulting Firm focused on delivering integrated business solutions. eDynamic is a rapidly growing, privately held company that delivers on the technology, creativity & marketing needs of enterprises. Through its offices in New York, Toronto, Dubai, and New Delhi, eDynamic is serving customers such as Suncor Energy, UPS, PepsiCo, New York Life, GlaxoSmithKline, Sunlife, General Electric, Allianz, Advance America, Preferred Commerce, Intercontinental Hotels, Maruti Suzuki, Jet Airways, Barista, Costa Coffee, Samsung, Sony, among many others.

eDynamic's service offerings include Application Development (Web based, .NET, Java), Application Management, Testing, Resource Augmentation, Systems Integration, Business Intelligence, Content Management Systems, Customer Relationship Management, Interactive Marketing and Business Consulting. eDynamic has deep domain expertise in verticals such as Insurance, Credit Cards, Pay Day Loans, Retail, Leisure Travel, Hotels & Hospitality, Business Travel, Real Estate and Franchise. eDynamic has enviable expertise in best-of-breed technologies such as Business Intelligence (MicroStrategy, IBM-Cognos, Business Objects, SQL, IBI), Customer Relationship Management (Microsoft Dynamics, Sales Force). eDynamic has technology partnerships with IBM, Microsoft and are also certified solution partners for Sitecore Content Management Systems in North America, Europe & India.



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- **IT Services**
 - Application Development
 - Application Management
 - Testing
 - Resource Augmentation
 - Systems Integration
 - Business Intelligence
 - Content Management Systems
 - Knowledge Management Systems
 - Customer Relationship Management
- **Interactive Marketing**
- **Consulting**



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eDynamic's Application Development services help companies address evolving business challenges by defining, designing and building custom applications that are based on their needs & driven by our vast pool of industry functional domain experts. We deliver high-quality, flexible applications that are easy to maintain, facilitate enhancements and are reliable. Our deployment, based on our Global Delivery Model, has built-in industry standard process quality frameworks and uses rigorous methodologies to mitigate risk and deliver cost and time-to-market benefits.

Portals & Process driven Web Application Development

We have successfully developed specific, need-based portals for customers within various verticals. These include:

- B2B & B2C, eCommerce Portals
- Knowledge, Learning Portals
- Employee Intranets
- Customer Portals (Online Insurance end customer experience models)
- Agent Portals (Online distribution channels for Insurance)
- Process driven web applications (Online business processes, calculators, product/service finders, comparison tools, etc.)

eDynamic uses strong Customer Experience, Information Architecture, Design and Development methodology (on both .NET & Java) and has expertise in cutting edge technologies.

Some of our relevant work cases in Portal & Application Development include:

- Corporate Meeting Solutions Portals
- Online Billing Information
- Customer self service Applications
- Customer Self Service Portals
- Online Sales, Distribution, CRM Portal
- Employee Intranets/Portals
- Alumni/Career Portals



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Challenges

- @Work Reporting provides Management Information to Corporate clients
- eDynamic was contracted to simplify the UI of MicroStrategy

Solutions

- Global team of 40 people worked on the project
- Redesigned the MicroStrategy UI to cater to Basic, Intermediate and Advanced users
- User Experience team created a user experience that blended into MicroStrategy
- Used our Global Delivery Model with offices in the US, UK, Middle East and offshore delivery centers in India, to reduce costs and improve quality

Benefits

- Single integrated reporting platform for all user types
- Created a UI framework that can simplify usage of MicroStrategy



Case Study - MI Travel Reporting Redesign

Fortune 100 Banking & Financial Service Company

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HOME PERSONAL CARDS FINANCIAL SERVICES TRAVEL SMALL BUSINESS CORPORATIONS MERCHANTS

Site Help | Search | Contact Us Logout

@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Report List

Viewing Options Create a Report

Export List by Show All By Category | By Objectives | My Customized Reports Report Scheduling Find reports... 60

Report Name	Date Created
<input type="checkbox"/> Air	
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines..	3/30/2007
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007
<input type="checkbox"/> Hotel	
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Spend in Questionable Suppliers Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007
<input type="checkbox"/> Car	
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007
<input type="checkbox"/> Non T&E	

Easy to follow;
Reports grouped in
categories;
Aesthetically pleasing



Case Study - MI Travel Reporting Redesign

Fortune 100 Banking & Financial Service Company

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The screenshot shows a web application interface for a report list. At the top, there is a navigation bar with links: HOME, PERSONAL CARDS, FINANCIAL SERVICES, TRAVEL, SMALL BUSINESS, CORPORATIONS, and MERCHANTS. Below this is a secondary navigation bar with links: @Work Home, Reporting, Program Tools, Resources and Help, and a date indicator: Updated Feb, 8, 2007. The main content area is titled 'Report List' and features a 'Viewing Options' dropdown menu. The dropdown menu is open, showing three options: 'List View', 'Report View', and 'Thumbnails View'. The 'List View' option is currently selected. The report list itself is a table with columns for report name, date, and status. The selected report is 'Airline consolidation opportunities'.

Report Name	Date	Status
<input type="checkbox"/> Report Name		
<input type="checkbox"/> Air		
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines...		
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007	
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007	
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007	
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007	
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007	
<input type="checkbox"/> Hotel		
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007	
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007	
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007	
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007	
<input type="checkbox"/> Spend in Questionable Suppliers Identify cardmembers who may be in violation...	3/30/2007	
<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007	
<input type="checkbox"/> Car		
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007	
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007	
<input type="checkbox"/> Non T&E		

Viewing options allow users to view reports in different ways. Similar to how Windows Explorer allows users to see information



Case Study - MI Travel Reporting Redesign

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HOME PERSONAL CARDS FINANCIAL SERVICES TRAVEL SMALL BUSINESS CORPORATIONS MERCHANTS

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@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Report Inbox

Viewing Options | Create a Report

Report List

Find reports... 60

Export | List by

Report Name	Date Created
Air	
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines...	3/30/2007 Description
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007 Description
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007 Description
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007 Description
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007 Description
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007 Description
Hotel	
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007 Description
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007 Description
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007 Description
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007 Description
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<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007 Description
Car	
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007 Description
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007 Description
Hon T&E	

Report Viewer

Top Airline Routes

Date Range: 3/2/2007 to 3/3/2007

Customize

3.0 mil
2.5 mil
2.0 mil
1.5 mil
1.0 mil
0.5 mil
0.0 mil

100%
75%
50%
25%
0%

YTD
YOY
%

Outlook or Lotus Notes
type List-View Capability



Case Study - MI Travel Reporting Redesign

Fortune 100 Banking & Financial Service Company

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HOME | PERSONAL CARDS | FINANCIAL SERVICES | TRAVEL | SMALL BUSINESS | CORPORATIONS | MERCHANTS

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@Work Home | Reporting | Program Tools | Resources and Help | Updated Feb, 8, 2007

Dashboard Viewing Options Create a Report

Report Viewer Customize

Top Airline Routes Date Range: 3/2/2007 to 3/3/2007 Change Date

Legend: YTD (dark blue), YOY (medium blue), % (light blue)

Y-axis: 0.0 mil to 3.0 mil

X-axis: Multiple airline routes

Report List List by: Air | Hotel | Car | Non T&E | Card Program Find reports... GO

- Top airlines carriers 3/30/2007 Export
- Airline consolidation opportunities 3/30/2007 Export
- Top Airline Routes 3/30/2007 Export**
- Airline Ticket Details 3/30/2007 Export
- Spend summary 3/30/2007

Next 5 of 15

Familiar user experience
- Windows Document Explorer Film Strip and MAC user experience



Case Study - MI Travel Reporting Redesign

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@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Create a Report Report Inbox >>

Basic information Data Management Format Report Save report as: Airline consolidation o Save

Select type of information

Select type of data
Cardmember Listing

Select corresponding report
Cardmember Listing - Summary
Cardmember Listing - Details
Transaction Listing by Cardmember

Select date period

Run reports for: Previous month Custom date: Start Date End Date

Schedule pattern

Reoccurrence: Daily 1am EST

Run Report Next

Interactive Sample Report Viewer Print

Summary	Current Period Domestic Spend USD	Current Period International Spend	% of YTD Total Spend	YTD No. Total Charges
Airlines	341,945.58	2,416	37.12	341,945.58
Cash	18,116.27	284	1.57	284
Total	822,117.27	14,924	100.00	15,678

Simple report builder with 'Interactive Sample Viewer' that allows users to see the reports they are creating



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Challenges

- In Business Travel, the client 's needs assessment process was manual and no standardized process or set of questions were being used by the Sales team
- Business Travel offers a wide variety of products and services which leads to a complicated needs assessment process. Due to the complexity involved, client needs are left uncovered
- The Business Travel Groups in EMEA and North America partner with eDynamic to implement the solution

Project Description

- The solution will facilitate an efficient and elaborate needs assessment process which will help the Sales team better understand client needs, and provide specific standardized actions, based on best practices, to improve client's travel management program
- The solution comprised of -
 - Diagnostic questionnaire - a dynamic questionnaire
 - Opportunity Forecaster - a tool that will help predict saving possibilities for a client
 - A Diagnostic assessment - A qualitative and quantitative assessment of client's situation

Benefits

- The needs assessment process will be thorough and the possibility of client needs being missed will reduce
- The diagnosis provided to the client will help the client understand opportunities of improvement
- Sales team will follow best practice of needs assessment to help clients
- Reduction of manual work in the needs assessment process



Case Study - Travel Lab

Fortune 100 Banking & Financial Service Company

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BUSINESS TRAVEL



TRAVEL LAB DIAGNOSTICS TOOL

Company Listing
Company Details
PRINT QUESTIONNAIRE

Company Profile EDIT COMPANY PROFILE

Company Name	eDynamic
Company Market	
Industry Type	Professional Services
Total Air Spend (\$)	0.00
Hotel Spend (\$)	
Card Spend (\$)	
Total Air Volume	0
Average Online Transaction Fee (\$)	
Average Offline Transaction Fee (\$)	
Touchless Online Fee (\$)	
Agent Assist Online Fee (\$)	

PASS Status PASS PROFILE START PASS SUMMARY PASS STRATEGY

Opportunity	Not Started
Competitive Dynamics	Not Started
Can We Win?	Not Started
AMEX Fit	Not Started

Diagnostic Status START QUESTIONNAIRE SUMMARY DELIVERABLES

Savings :

Travel Policy	Not Started
Supplier Strategy	Not Started
Online Adoption	Not Started
Meeting Expense Management Program	Not Started

Service :

Traveler Satisfaction	Not Started
Call Center	Not Started

Control :

Policy / Program Strategy	Not Started
Management Information	Not Started
Globalization	Not Started
Expense Management	Not Started
Traveler Education	Not Started



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[Change Password](#) | [Logout](#) ^

BUSINESS TRAVEL

TRAVEL LAB DIAGNOSTICS TOOL

[COMPANY LISTING](#)

Company Profile

Basic Profile

Company Metrics

All fields marked with * are mandatory

Company Name *	<input type="text"/>
Industry Type *	<input type="text" value="-----Select-----"/>
Secondary Industry	<input type="text" value="-----Select-----"/>
Name of existing travel agency	<input type="text"/>
Number of countries in which the company is present *	<input type="text"/>
Number of countries consolidated into company's travel program	<input type="text"/>
Does company have any active travel program business plans in place?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Does company have a travel policy in place?	<input checked="" type="radio"/> Yes <input type="radio"/> No

[SAVE](#)



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BUSINESS TRAVEL

TRAVEL LAB DIAGNOSTICS TOOL

[COMPANY DETAILS](#) [SUMMARY](#) [DELIVERABLES](#)

Savings | Service | Control

Savings Service Control

Travel Policy | Supplier Strategy | Online Adoption | Meetings Expense Management Program

edynamic

All fields marked with * are mandatory

1. How is a travel policy adopted by your organization? *

- Global single travel policy
- Multiple policy groups per country
- Policy is recommended by headquarters but can be edited if needed
- Light policy / recommendations / guidelines
- No policy management
- Not Applicable

2. Describe the level of support that the management has for the travel policy. *

- Senior management fully comprehends importance of policy and is willing to enforce
- Mid-Management supports travel policy, but rarely enforces and does not travel measurements against it
- Management sees no need for travel policy
- Not Applicable

3. Which of the following describes the auditing frequency for compliance of the policy?

- Real-time auditing (pre-trip)
- Timely

Questions Completed - 0 of 21

[RESET](#) [← BACK](#) [NEXT →](#) [SAVE](#) [EXIT QUESTIONNAIRE](#)



Case Study - Travel Lab

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BUSINESS TRAVEL

TRAVEL LAB DIAGNOSTICS TOOL

COMPANY DETAILS EDIT QUESTIONNAIRE SUMMARY

Diagnostic Assessment Report Opportunity Forecaster Input Upsell Alerts PRINT

edynamic Time of Deliverable : 6:33 AM
Date of Deliverable : 6/12/2007

Diagnostic Results

The final rating for edynamic Company, determined through the diagnostics program, falls in the Non Acceptable category compared with 10 organizations selected from the database of companies belonging to the same industry 'Manufacturing' with similar air volume of \$. The ranking for the edynamic Company's travel program is 2 out of 10. This section displays the score and rank for edynamic company when benchmarked amongst its peers of same industry and similar size. Out of a high possible rating of 20, edynamic shows the following results:

Category	Company Score	Industry Average
Travel Policy	~10	~18

GENERATE DELIVERABLE

Internet | Protected Mode: Off 100%



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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"



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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.



Case Study - Corporate Meeting Solutions Portal

Fortune 100 Banking & Financial Service Company

IT Services & Solutions

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



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Solution

Francesca: Online Meeting Planning & Budgeting Tool

Data Manager: Data Warehouse & Reporting



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Francesca - Overview

- Web-based “dashboard” with a customized “homepage” geared to the individual user - whether planner, team leader or MPS
- Data is pushed into Solomon in background and in “real-time”
- Data entered will be 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 then seamlessly feed data to Solomon
- On-screen “snap-shot” of status of assigned programs
- Ability to post alerts and messages to the application dashboard as well as through email



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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

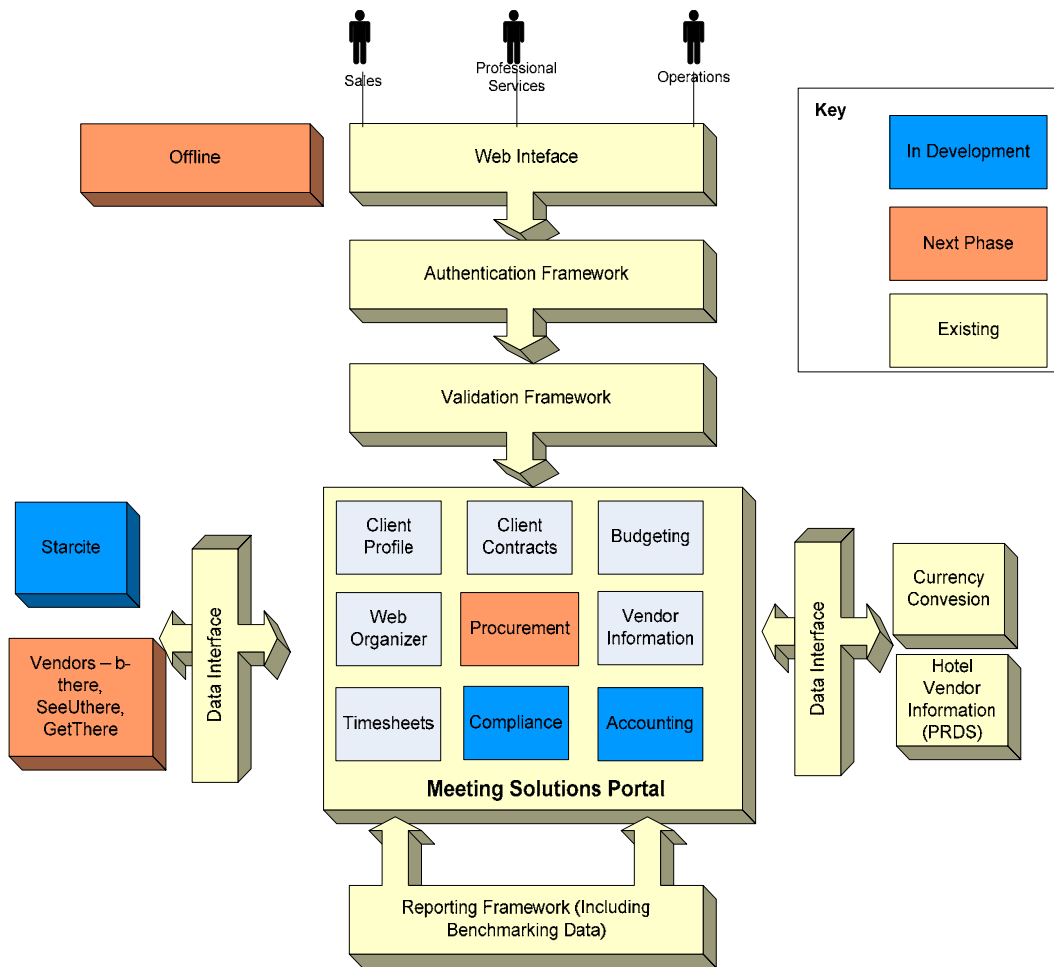


Case Study - Corporate Meeting Solutions Portal

Fortune 100 Banking & Financial Service Company

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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
- All data will be validated
- 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 banking & 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



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Francesca - Globalization

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



IT Services & Solutions

Client Setup - Client Snapshot

→ Client Snapshot

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

Designed & Developed by eDynamic Corporation

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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Case Study - Corporate Meeting Solutions Portal

Fortune 100 Banking & Financial Service Company

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

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

→ 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 >>](#)

→ 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 >>](#)

→ Program Notes

[Edit](#)

→ Other Information

- Revenue [Add](#) | [View](#)
- Client Required Fields [Edit](#) | [View](#)
- Procurement Fields [Edit](#) | [View](#)
- Checklist Master [Edit](#) | [View](#)
- Task [Add](#) | [View](#)



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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

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

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 <input type="checkbox"/>

Food & Beverage

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



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Data Manager - Background

- Clinet's CMS Advisory Services group was finding it a challenge to justify the value of its services without **extensive data reporting measuring the goals of the client and commitment of CMS group.**
- CMS Group was **moving towards a consultative organization.** Without in-depth data intelligence, it was a challenge for the CMS group to provide consultative services to its clients.
- In order to have an edge over the competitors, **CMS requires some historical data** to understand the client's past performance & behavior.
- "Single truth of data" - CMS Group requires a **centralized source for its reporting capability** to provide its client single truth of data.
- CMS Group needed **benchmarking capabilities to aid comparative analysis** between Clients, Client Vs Client, Client Vs Client Industry Groups and Client Vs CMS Group Clients.



IT Services & Solutions

Technological gaps

- Archaic reporting structure
- Generating reports in grid and graph format was a very labor intensive process which involved manual retrieval of data from disparate sources, followed by tedious consolidation activities on a spreadsheet.
- Question marks over reliability of data - duplication, non-standardized, non-conforming format etc.
- Inability to create Ad-Hoc reports. Creating reports could take weeks in the existing environment.
- Data sources were not centralized or connected. There are islands of data that are in "silos" making reporting from data sources very difficult and cumbersome.
- Existing reports were 'canned'. Users didn't have the ability to create/modify reports based on the client's needs.
- Need to provide enhanced analytical analysis of past meeting data and enhanced feedback to existing and potential customers for effective business planning and operations.

Data Manager - Gaps

Challenges

- Delay in responding to clients on questions about their programs
- Lack of data intelligence to efficiently and effectively analyze the health of client's programs
- Creating reports is a tedious exercise
- Clients are demanding more customized intelligence on their programs and comparisons with the industry



Impacts

- Client Satisfaction
- Compromises consulting capabilities
- Time with clients utilized on important activities
- Alignment with client expectations



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Data Manager - Solution

- Implement an end-to-end Solution that manages the lifecycle of a client relationship, automates processes, provides seamless access to data and brings all groups within CMS together

Guidelines

- Establish protocol to storing information - Individuals should not be allowed to store information based on personal preferences and start creating unnecessary data stores. A Technical Administrator should be involved in all such decisions.
- Connect Sources of Data and centralize data storage - Migrate all Excel Based and MS Access based data stores into a single SQL data store.
- Centralize data entry points - Sales, Operations and Professional Services will enter data through a common web interface.
- Create a strong validation layer on the data storage
- Provide access to data across the organization
- Automate Processes
- Cleanse existing data



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Data Manager - Benefits

- Increased Organizational Resilience
- Alignment with high level organizational goals:
 - **Enabling Growth:** Given the aggressive plan for the next 5 years, the system would enable higher organizational bandwidth through increased productivity and reduction in inefficiencies
 - **Lowering Cost Per Transaction:** Cost Per Transaction is a critical parameter in this business, the solution will significantly impact this parameter by creating efficiencies
 - **Increase in Client satisfaction and meeting client expectations:** Increased client satisfaction as well as client retention is a core goal of any organization. The system not only becomes an enabler for the latter it also Lowers the cost of client retention and cost of delivering satisfaction



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Data Manager - Benefits

- Single truth of data
- Reporting on all data points
- Reduction of manual errors
- Customized reporting for clients
- Ad-hoc reporting
- Real time and in-depth intelligence
- Improve meeting manager processes
- Identify areas of improvements in service delivery
- Benchmarking capabilities
- Identify new opportunities of growth
- Analytical data for use in consulting with prospective client
- Improved look and feel of reports, with company branding



IT Services & Solutions

- Client wanted to build an agent portal
- Client wanted a portal that would have a high adoption rate, as agent portals have a low adoption rate in the industry
- Client wanted the portal to be very user friendly
- eDynamic prepared a list of requirements
- Functional specifications were created
- A prototype was created
- User testing was done on the prototype and also, eDynamic usability experts conducted usability testing
- After a few iterations the site functionality, flow and look and feel was finalized
- eDynamic created High Level and Low Level design documents including User Cases, Class Diagrams, Sequence Diagrams, etc.
- The system was built to requirements and adoption rate was very high. The Prototyping was a key success factor.




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Compensation | Policy Servicing | Tools | Rewards & Recognition | Training | Information Center

007 - Pension Balanced Fund: Rs. 13.18 | Conservative Fund: Rs. 14.26 | Growth Fund-Pr Driven: Rs. 25.67 | Pension Secure Fund: Rs. 11.12 | Pension Growth Fund: Rs. 15.57 | Pension Conservative Fund: Rs. 11.88 | Balanced Fund-Pr Driven: Rs. 18.09 | Growth Fund: Rs. 25.67 | Pensio

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IT Services & Solutions

- It is difficult to be in touch with 7000 plus employees in more than 150 locations across the country
- The policies and decisions of the management cannot be propagated to each and everyone within the organization in real time
- This project module comprised of developing an intranet site for the employees of Max New York Life
- The intranet would cater to various needs of the employees such as information about various departments, applications that the employees use in order to successfully complete their day to day work routine
- This intranet will help the team in achieving harmonious organizational communication
- Sharing information regarding management decisions and major events that have taken place in the past
- Intranet facilitates the perfect platform to work and communicate in groups or teams
- The Intranet Site users can view their career path and find necessary information about other employee or departments within the organization
- Mail service through the Intranet is fast
- Current events and news can be easily viewed on the intranet



Case Study - Enterprise Portal

Max New York Life

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MAX
Your Partner for Life®

FOUNDER'S DAY
on 1st October

Home . Help . Feedback . Sitemap . Sign Out

GO WEB

Advance Search

EMPLOYEE SEARCH

First Name Last Name GO

- About Us
- Departments
- Tools You Can Use
- Career Center
- Rewards & Recognitions
- Fun @ Work

New Joinee
Forms & Policies
Organization Chart
Technology Assistance

Welcome To Enterprise Portal

Just Uploaded
MNYL NEWS
Media Coverage
Industry NEWS

- MNYL launches Masti Ki Paathshaala..
- ISO STAR Audit coming up..
- Cricket match to be played against Nestle..

More..

MNYL VISION PYRAMID

Max New York Life focusses on its Mission for constant growth and its strategic initiatives have helped Us to be pioneer in our own ways of dealing our Indian Business. We not only focus on our growth but we constantly work in improvization of our surrounding. Our motto is fulfilling the requirements of our customer.

More..

CULTURAL AMBASSADOR AWARDS

My Applications

- Ingemium
- My Money
- My Agent
- My Flow

More..

Policies Forms

- HR Policies
- Information Security Policies
- Quality Policies

More..

MNYL Poll 1 MNYL Poll 2

Diwali Celebrations

Max Premises

Outside

Vote

More..

SMART Steps

Jeete Aapke Bachche Har Kadam Pe...

Project Everest

More..

People Corner

- Best Salsa Dance performer
- 4 New Birthdays
- Check your Hit Points
- Best Caption for IT Townhall
- Personal Profile

More..

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- eDynamic has developed & designed an Enterprise Portal for Max New York Life. The Prototype developed is based on research on the industry best practices & competitive benchmarking to go with requirements provided by the customer.
- The Enterprise Portal is being positioned as a one-stop-shop for an employee to easily access the tools and information they need to get their jobs done.



IT Services & Solutions

- eDynamic has developed and designed a Group Portal for Max New York Life. This portal caters to the needs of CORPORATE CLIENTS of the Insurer. Corporate customers can access information on each & every product available/bought, track the records of their respective employees insured ,etc.



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Welcome to "Max New York Life Insurance-Group Portal"

[Contact Us](#)

Log In

MNYL Group Portal is a private, secure portal which provides access to policy information and shared documents with the Group Policy customers. The portal enhances customer relationships by providing 24X7 access to the policy / premium statements along with product brochures, process documents, and much more. The customers can also generate request in order to manage their policy.

Happy Login!

Username * :

Password * :

[Forgot Password ?](#)



IT Services & Solutions

- Group Portal is a private, secure website which enables the Insurer to share
 - Documents and Policy information with their Group Policy end customers.
 - The portal enhances customer relationships by providing complete 24X7
 - Access to their policy/premium statements along with product brochures
- Process documents, etc. online.

Technology Used

- JAVA
- Web Sphere
- Oracle



Case Study - Online Billing System

Fortune 100 Banking & Financial Service Company

IT Services & Solutions

- eStatements for Credit Card reporting for Central Bill products had offline statements that had to be converted to e-Statements on a complex reporting platform, IBI
- These statements would be rolled out globally across 100 countries

- eDynamic's user experience group, Card program expert analysts and Reporting team worked collaboratively together to convert offline statements into e-Statements.

- Converged over 10 different BTA statements globally into a single integrated PDF statement.
- Created an online experience for the statements that allowed users easy information access



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Example of a 'before' statement

Business Travel Account - Statement							
HONEYWELL CONTROL SYSTEMS LTD							
Account Number		3742-982281-01000		Statement Date		15/06/2005	
Travel Office		BIRMINGHAM DALE END					
Page No	383	Travel Office Tel No	08706 000548	Statement Id	982281005166	Currency = GBP	
CLEARING TRANSACTIONS - INFORMATION ONLY							
Statement Reference	Invoice Number	Routing	Departure Date	Ref 1 Ref 3	Ref 2 Ref 4	*	AMOUNT
12933303134	000115044	T FEE ETKT DOM MACDONALD NO LONDON-HEATHROW AIRP	12-MAY-05	E169847 BDS SBEX	ACS SOX		20.57
12933303141	000115055	T FEE ETKT EUROP WHITEHEAD JO BUDAPEST	13-MAY-05	E190267 HBSX BSOL	ACSX 3036		20.57
12933303160	000115090	T FEE ETKT DOM DEWHURST CO LONDON-HEATHROW AIRP	19-MAY-05	E167992 ACPX XXXX	ACSX 113004		20.57
12933303165	000115088	CO00548053952796 REID.AL CHICAGO O'HARE INTL	09-MAY-05	E169767 ACPX SCXX	ACS 66030		864.30
12933303166	000115098	T FEE ETKT INTL REID.AL CHICAGO O'HARE INTL	13-MAY-05	E169767 ACPX SCXX	ACS 66030		20.57

Continued on Next Page



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The New PDF statement online

Account Number: XXXX-XXXXX-01003 Page: 1 of 10

Rexport Company Ltd.
1020 Avenue Rd. Suite 200
New York, NY, 11385

Travel Office: Dale Travel
Tel No.: 1-800-528-4455

Statement Date: 02/26/07
Account Number: XXXX-XXXXX-01003
Statement ID: 982261005166

Account Summary

Previous Balance (\$)	Payments Credits (-) (\$)	Other Credits (-) (\$)	New Charges Debit (+) (\$)	New Account Balance (\$)
30,000.00	30,000.00	0	160,000.00	160,000.00

Your past due balance is due immediately and may be subject to a late payment charge. Please see page 2 for details. If you have recently paid this amount, please disregard this message. Thank You

Payment Due Date: 03/15/07

Remittance Slip on the Last Page

Spend by Top 5 Vendors

S.No	Vendors	Total Charges (\$)
1	American Airlines	20,000.00
2	Continental	20,000.00
3	Delta	20,000.00
4	United Airlines	12,000.00
5	Budget	10,000.00
TOTAL		\$ 82,000.00

Spend by Top 5 Vendors

American Airlines	25%
Continental	25%
Delta	25%
United Airlines	15%
Budget	10%

BTA Statement Contains

Account History	2
Transaction Details	4
Terms and Conditions	9
Remittance Slip	10



eDynamic - Some of our Customers

