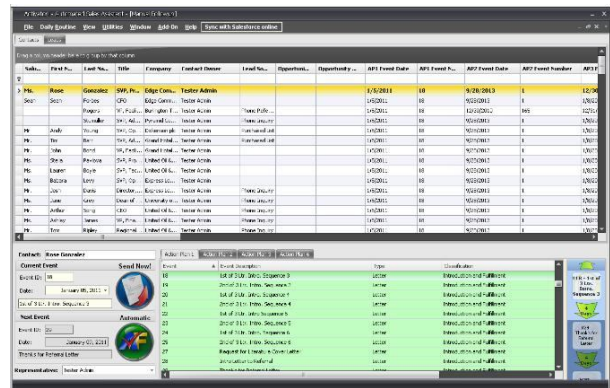




CRM & Sales Automation Software

Executive Summary

The client firm had never contracted work to any firm locally or globally. Contracting work to another firm and that too in another country was a double-challenge for them. Mindfire's immense experience in Windows/Web software development, Microsoft and related technologies helped establish the initial trust level. This was well supported by the different business engagement models Mindfire proposed to the client firm. A fixed resource



arrangement for 3 months on a test-basis started what later became a long and healthy relationship amounting to a full scale virtual team setup on the Sales and CRM Automation software suite development, crucial to the success of the client firm. Mindfire delivered a full scale, extensible virtual team setup, with experienced resources involved in multiple technologies for client and server applications. Having had years of experience providing virtual teams to numerous clients, Mindfire continues to use its unique remote development methodology based on critical success factors, with a strong understanding of the subtleties of distributed & synchronous/asynchronous collaborative efforts.

About our Client

Client CRM, Sales & Marketing Consulting Group | **Location** TN, USA | **Industry** CRM

Business Situation

The client had a version of the product which was only compatible with Sage's Act CRM. The product was not stable and had compatibility issues with different version of Microsoft Office and Operating Systems. Also client had a vision to develop to a similar kind of product (Add-in) on other CRM's like Microsoft Outlook; Microsoft Exchange Server; Salesforce.com.

Mindfire offered its services and claimed client's confidence showing expertise in related domain and technical areas, as well as the remote work protocol. Initial discussions were held on shared development, establishing point of contacts, communication and collaboration plans and arrangements, prior experience and success



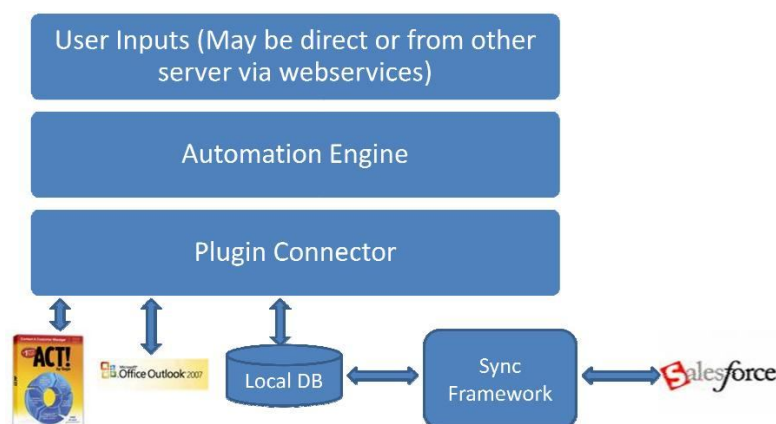
commitments/guarantees -integrated change management with risk aversion and mitigation plans. A plan was made to:

- Interview and assess the proposed resource, a lead software engineer as the primary point of contact for the client firm.
- Assign preliminary work to the engineers allowing him time to understand the system.
- Assess progress and appropriately time the extension of the virtual team to 2-4 resources, also extending the responsibility of the lead software engineer to a project manager for the client firm on Mindfire's end. This would mean extending project management responsibilities allowing for greater authority on decision making required for the project(s) development at Mindfire.

Solution Details

The Mindfire Solution

Since the requirement was to extend the compatibility of the application to two new CRM's and the nature of the Business and application is such that in future it will be required to make the same application with various others CRM'S. Client wanted to use other third party CRM integration solution, but with its royalty package it was not a cost effective solution. Mindfire virtual team resource proposed to develop a plug-in connector which will be generic enough to connect to various standard CRM's available. The plug-in development would initially take some time to develop but in future integration with new CRM's will take much less effort and time to develop and hence would also reduce the development and maintenance cost of the application.





Achievements

Mindfire started off with one CRM version of the application and today 4 different CRM's version are successfully running and being marketed by the client. All versions are working and supported on various version of Operating systems and Microsoft Offices. The plug-in connector and Sync framework solution proposed by Mindfire is a success and now the application can be quickly customized and integrated with other CRM's.

In the last three years:

- Addition of 5 new add-ins to the product. Three major versions of the Act build have been released.
- Within first 3 months of development an outlook com-addin build was released. Now the product has been updated to latest version of VSTO.
- **Online licensing system** – New online licensing system is a centralized system for all the versions and its add-ons. The licensing of the application is based upon per user per system basis. While registering the application, it connects to this licensing server via web-services. Using this new feature client is now able to monitor the complex licensing system of the application from one place.
- **Online Landing Page** – Client sometime refers this module as a magic ball, which performs the most difficult job of any marketing software in just a click of a button i.e. adding new contacts/leads directly from the online landing page to a desktop CRM. This online landing page module directly transfers the new contacts/leads data from the web-server to desktop application and User can add huge number of contacts/leads into the CRM by clicking a button only once.
- A Salesforce compatible build was released with two new additions a local (buffer) database and a sync framework. The application is a Salesforce App Exchange Certified application.

Technologies

VB.Net , Microsoft Access, VSTO (Visual Studio Tools for Office), DevExpress, Outlook Security Manager, Swiftpage API Integration, Microsoft Office Interop Assemblies, Symantec Winfax, Online faxing like myfax.com, Salesforce API, SQL Server, Sage's Act Integration, Microsoft Exchange Server



Methodologies

Due to the remote development nature of the project, we and the client came to conclusion that we will be following spiral/iterative model of software engineering for the development. By following these principles we will be releasing the builds for our internal testing and at the same time regular uploads to client for reviewing the current development work as well as suggests/requests new changes before the final release. Apart from this we also use to release beta builds for clients and their partners for feedbacks. By using this methodology client can review the working of the product in actual environment much before the final release and can make a change request/new feature during the development phase itself without compromising on the final delivery date.

We do also provide the login to our bug tracking system where client can log in anytime and can view the status of any bug/new feature request and can also set the priority of the jobs.

Apart from regular core software engineering principles, we also follow:

- Development document
- Coding discipline document
- Code reviews
- Configuration management

Final Results

Software System

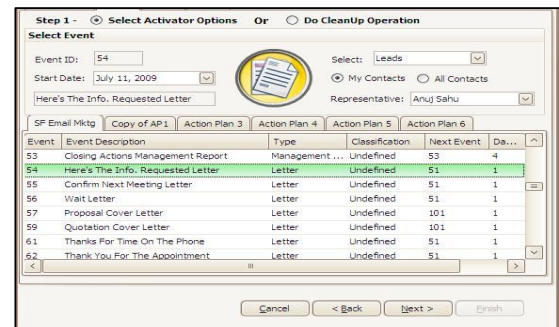
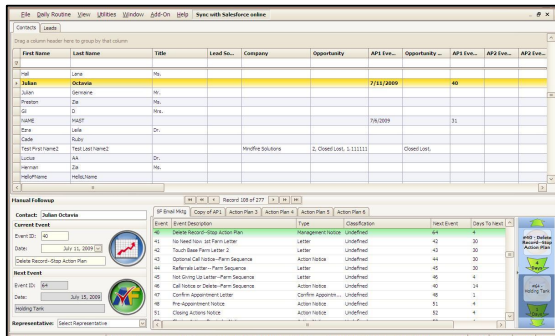
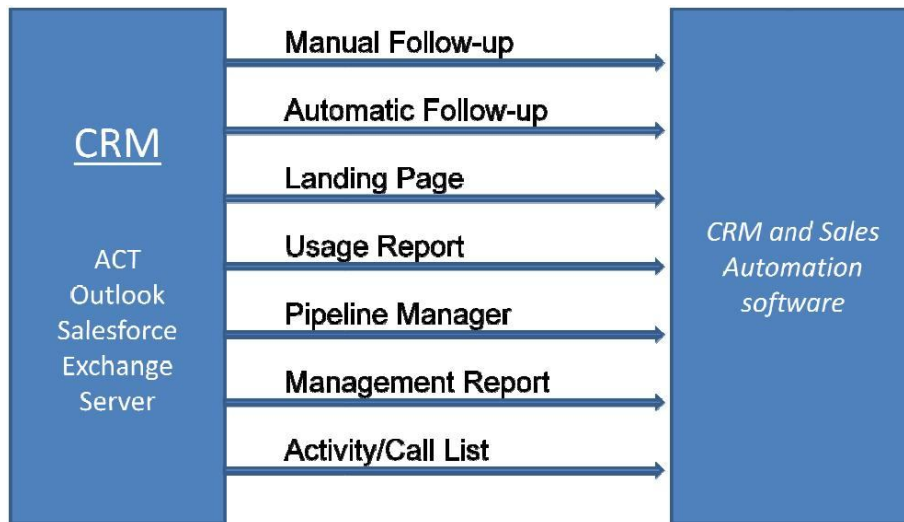
The solution of plug-in connector between the Automation Engine and CRM's helped to quickly connect to different CRM's with other Interfaces of the product remaining the same. The rework for the developer in automation engine while connecting to a new CRM reduced to almost 60 to 70%. And thus, reducing the time frame, for development work, while making, the product compatible to any new CRM.

Initially the application was developed on .Net 1.1 platform and compatible with Act 6.0, Office 2003 and XP (32 bit only). Currently 4 different version of the application are:

- Upgraded to .Net 2.0
- Compatible with Microsoft Office 2007/2003
- Compatible with latest version of Act 2010 and all previous versions



- All builds are working on Windows server 2008/2003; XP and Vista (both 32 bit and 64 bit)
- Separate custom versions for Act; Outlook; Salesforce and Exchange server
- Full featured centralized online licensing system.



Customer Benefits

Client has already spent three years of success with Mindfire. During these 3 years product has been constantly enhanced with addition of five new add-ins and three other version of the product i.e. Outlook; Exchange Server



and Salesforce.com. With the dedicated virtual team in India client has immensely reduce the cost in developing and supporting (enhancements and fixes) for four different version of the application.

Future relationship

This is the fourth year with the client and Mindfire is working on the next major release of the product a web version and Integration with Microsoft CRM in next phase.

