

CAIL / iAdvance IT

Business Process Integration Manager (BPIM)

To improve business outcomes

- with Mobile
- at the Desktop

BPIM Overview

- ▶ **A software solution to centralize data gathering, storing, and reporting that improves -**
 1. Work flow and business processes
 2. Communications within the business and with Customers
 3. Business outcomes

- ▶ **Who Benefits with BPIM :**
 1. Service / Installation companies
 2. Personnel in Sales / Customer Service / Administration / Management
 3. Manufacturers, Distributors, etc.

- ▶ **Why use BPIM :**
 1. Increase revenue and profits
 2. Reduce operating costs
 3. Quick ROI
 4. Expand business opportunities

BPIM Benefits

- ▶ **One Solution** to aggregate information and provide **seamless work flow** from beginning to end of business processes
- ▶ **Increase efficiency** and accuracy of technician reporting as well as improve office / field personnel communications.
- ▶ **Pro-active scheduling** of Preventative Maintenance to ensure safety of working products.
- ▶ **Improved Customer satisfaction** with more responsive follow up to requests
- ▶ **Better manage corporate assets**
 - in the field, property, personnel activities, etc. (ie: trucks, equipment, parts, etc.)
- ▶ **Improve decision making** with timely, current information and **customizing the solution** for a better fit with your company needs, operations, etc.
- ▶ **Communicates** with existing programs (ie: Accounting, CRM, etc. software)
 - to leverage the investment and familiarity with current systems
- ▶ **Decrease repeated data entry** to improve productivity and processes - from the start to end of an order
- ▶ **Increase revenue and profit - Quick ROI**

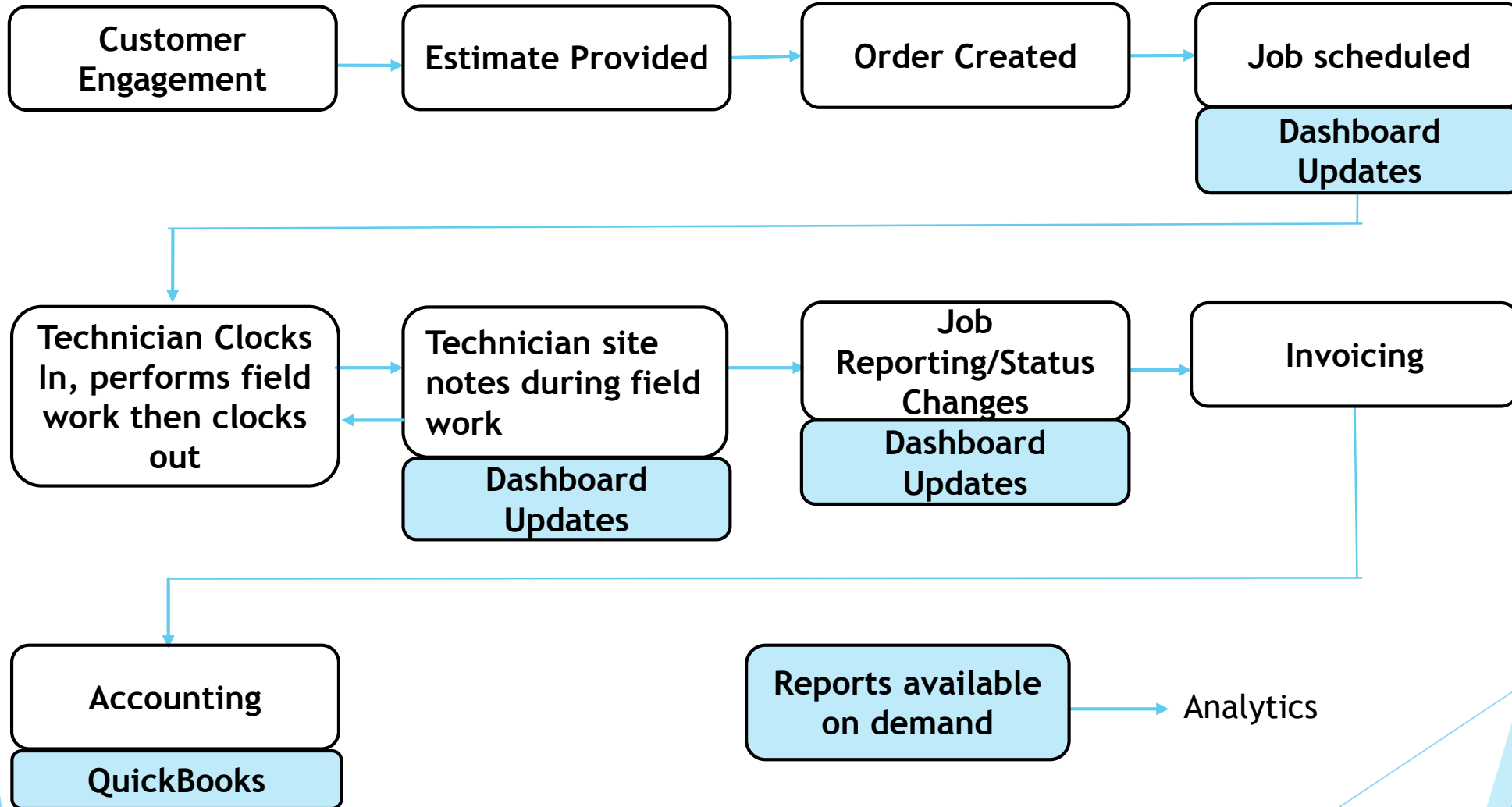
BPIM - A Centralized System that includes -

- ▶ Customer Database
- ▶ Inventory Management
- ▶ Quoting / sales management
- ▶ Orders and field work orders
- ▶ Scheduling of work
- ▶ Real time status updates of work performed
- ▶ Time sheets
- ▶ Field notes, pictures, pdf's, customer signature
- ▶ PM Contracts
- ▶ Purchase orders
- ▶ Customizable reporting
- ▶ Integration/interfacing with current invoicing system
- ▶ Audit trail
- ▶ Cloud/server security
- ▶ Roles/rules for employees
- ▶ Scalable to grow with business
- ▶ Used on PC, iPad, android and windows tablet
- ▶ Geolocation of customer/employee

BPIM - Seamless work flow between Departments



BPIM - Business Process Flow Example



Process iteration includes:

- Multiple estimates may be required before work is approved
- field work may not be completed in a calendar day
- job reporting will occur multiple times depending on job progress
- Dashboard updates from the field keep everyone informed

BPIM - The Platform

Powerful easy-to-use solution for creating customized, data-driven reports to improve business outcomes associated with:

- ▶ **Slow Manual Processes** - Gather & share information manually - inefficient
- ▶ **Scattered Information** - in separate systems, on paper, in spreadsheets, etc.
- ▶ **Dated Technology** - requiring workarounds to meet new or changing business needs

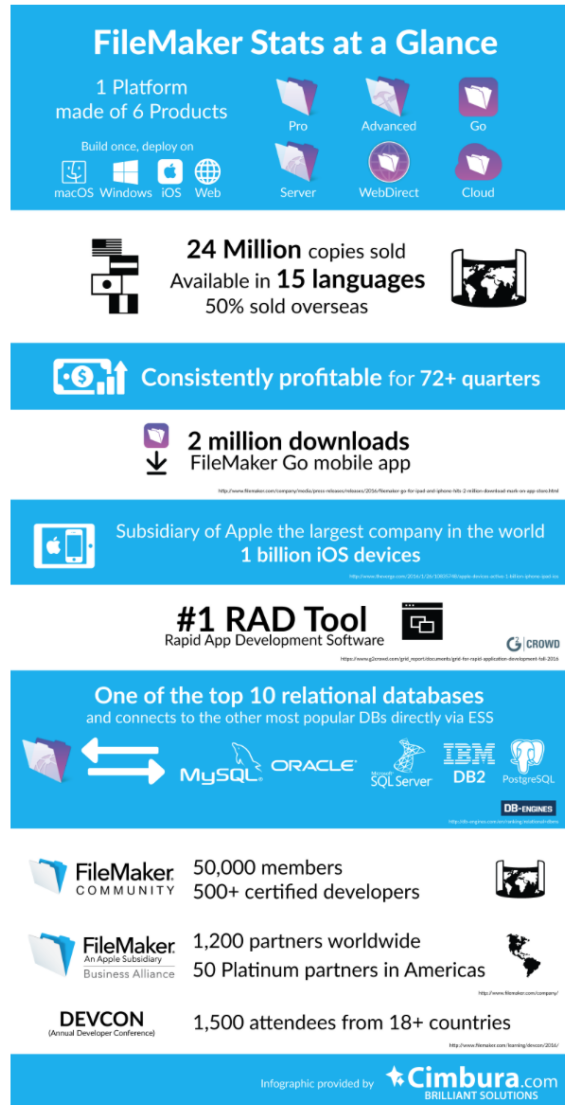
BPIM Benefits:

- ▶ **Share** - Information shared among Team members in real time
- ▶ **Integrated** - Large business approach for small business, no re-keying
- ▶ **Perfect Fit** - Customized to meet your needs; no workarounds/offline processes
- ▶ **Mobile** - Take it with you - iPad, iPhone, tablet, android, laptop, web
- ▶ **Multi-Platform** - Mac/Windows/Web Browser/iOS/Android Tablet
- ▶ **Rapid ROI** - Low development & Operational costs; quick development
- ▶ **Secure** - AES 256 Encryption
- ▶ **Roles** - Confidential information kept that way
- ▶ **Audit Log** - Who did what? commitment
- ▶ **Established** - proven technology platform

BPIM - Business Engagement Approach

- ▶ **Discovery** - To address company plans, opportunities, challenges, etc.
- ▶ **Deliver Value** - Added capabilities to facilitate achieving business goals
- ▶ **Collaborative** - “Walk With Me” approach during the project
- ▶ **Multi-Phase Project** - Start with prototype, training, do periodic reviews, perform risk assessment, etc.
- ▶ **Solution Design** - That is intuitive and modern to better manage the business, the data, streamline workflows etc.
- ▶ **Provide the Application with FileMaker Platform and IT Services**
 - For a complete solution with software and hardware expertise
- ▶ **Results Oriented** - To improve business outcomes
- ▶ **Experience** - 30 years’ designing / building technology solutions

BPIM - Technology Platform Statistics



Reference Material

- ▶ <http://www.filemaker.com/products/>
- ▶ <http://www.filemaker.com/solutions/showcase/>
- ▶ <http://www.filemaker.com/solutions/customers/>

BPIM - Next Steps

▶ Discovery

- Overview of your procedures and requirements
- Cost analysis of current systems and expected ROI with BPIM

▶ Review of Requirements

- An acknowledgement of our understanding

▶ Proposed Plan

- A proposal will be prepared based on your requirements
- An iterative approach will be implemented allowing for a change of requirements or priorities

▶ Execution

- An execution plan is presented that addresses the requirements
- A project schedule is provided for the added business capabilities

BPIM - Contacts

▶ Lindsay Pick
lpick@cail.com 905-940-9000 x 290

▶ Doug Clare
doug@iadvanceit.ca 647-882-0063

▶ Peter Sargautis
pete@iadvanceit.ca 416-500-4291

www.cail.com/mia/