Hi everyone. Thanks for joining me on the first TRI Webinar. This is a test on so many levels. I'm really hoping the technology works in my favor.

The purpose of this webinar is to provide some insights on the impact custom software can have on your relationship with your customer.

So, It's hard to quantify the impact of all this but it's become apparent to me that VALUE becomes the tie that binds over time and allows the business relationships to transcend personal relationships and software can be used to help create that value.

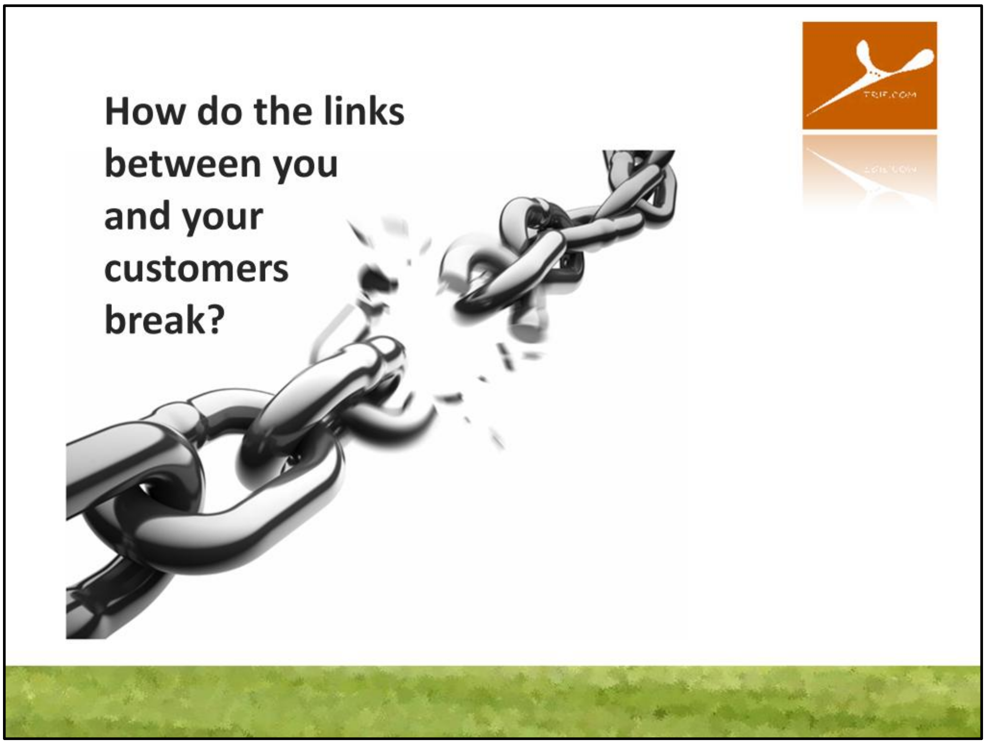
But it is a little more than that I hope. One of the things I've learned since I started my business (and mind you I have only recently come upon this realization) - The one thing I have learned is that you can't sit by and wait for people to ask for what they need. You need to push for information which brings out the needs that people have. Because bottom line ---- they don't really know. Things are moving too fast for them to know.

So you need to talk, and dig, and probe, and talk some more and maybe then you can understand what they need and how you might be able to help. It's a new way of thinking.

So let's start by talking about relationships. People always say business is business, but I think it is way more than just business. I think it's personal. And then it's business.

So I want to drive the point home that relationships are personal and that makes business personal.

A relationship binds one person to another or a group of people to a group of people but I am always looking to make the relationship more than that. I am always looking to add unique value to the relationship. I think software can be used to demonstrate that unique value.



So if we turn the coin around a bit and look at the negative side of things, let’s look at how the link between you and your customer might break.

We’ve all seen it at one time or another. I know you’re already thinking about the customer you lost because your primary contact left the company. Who knows why, they retire, they move out of state, they get transferred. Maybe the company is upsizing. Maybe it’s downsizing. People move around from one position to another. Whatever… It doesn’t matter. What does matter is they aren’t around any longer.

So a new person is hired - someone new is in charge. A new boss arrives and all of a sudden it’s time to review all existing relationships.

If the relationship is only personal and non-distinct, you can be in trouble.

So how can we take the personal quotient out of play?

How do we supplement and enrich the personal relationship of the business?

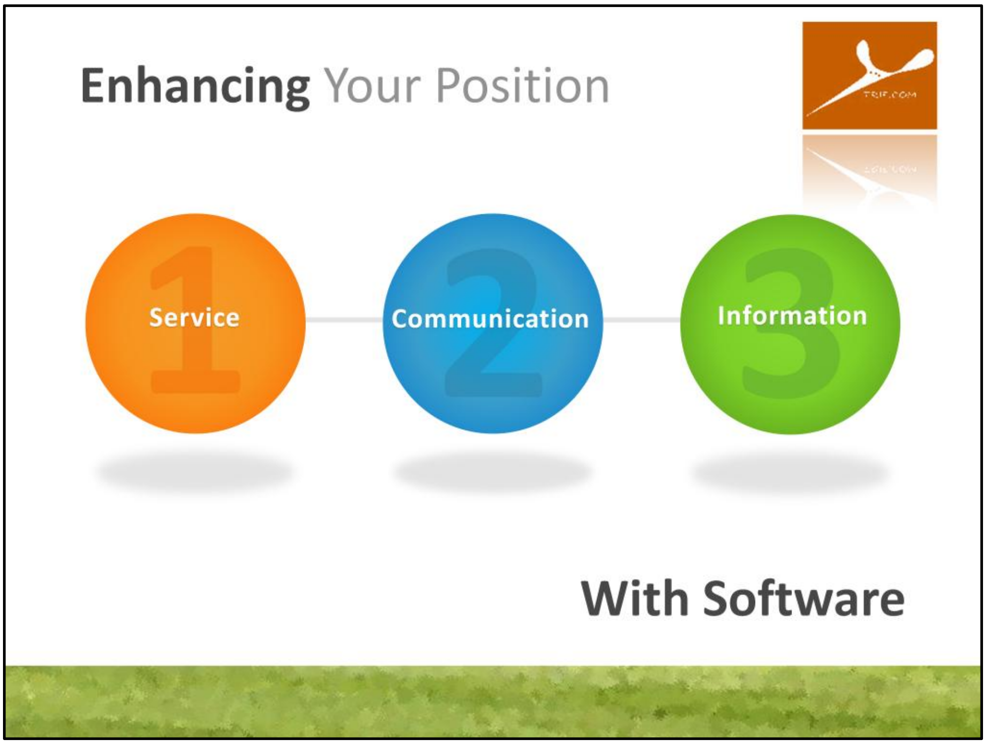
I think we need to provide added value that is objective, measurable and real
Create a little nugget of differentiation, a golden link that can't be broken

Something more than personal – we want to give our customer other reasons to connect with us and only us – other reasons to buy from us and only us – other reasons to use our services and only our services.

Moving the focus of a relationship from personal to value has objective worth. It can help bridge gaps in changing personal relationships. Sometimes, it can be used as a bargaining chip to attain better pricing.

So here we go --- how can you move beyond personal relationships? By touching three areas in a special way. Service, Communication and Information.

By that --- I mean a better way of providing service, a way of communicating more clearly or efficiently, providing information that is new or customized or immediate. All these things can help bridge the gap and enhance personal relationships.



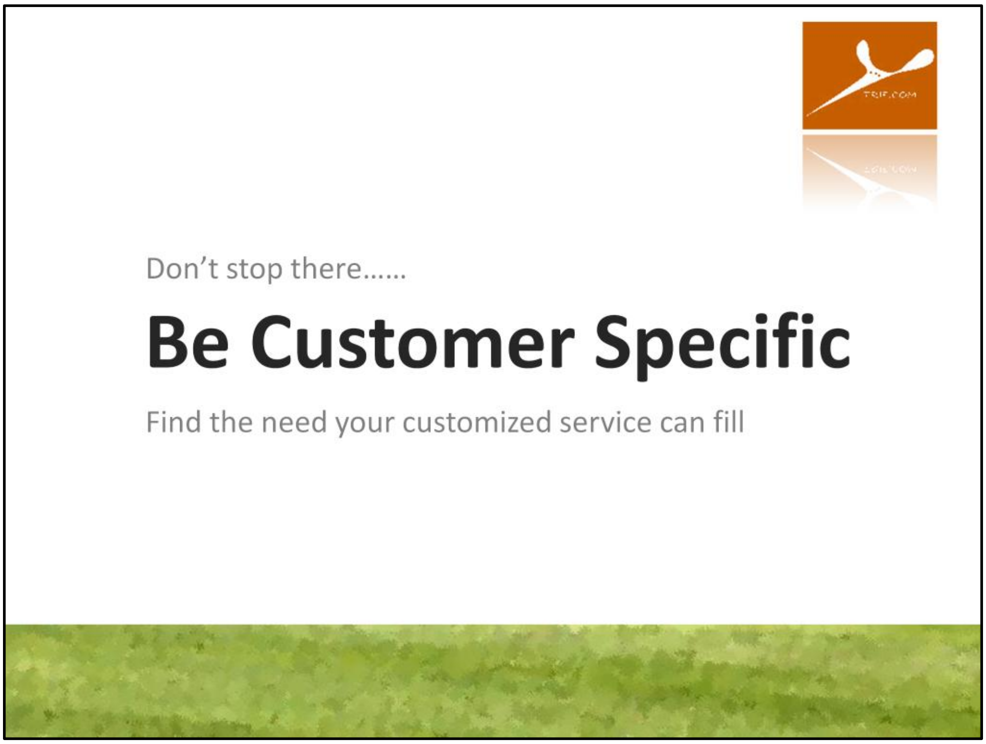
Lets look at the ways you can enhance your connection using software as the glue that can help to transcend a personal relationship

You can use software
--- to customize or differentiate your service

You can use it to
--- improve or enhance communication

And you can use it to
--- deepen the information you share and how you share it

With the right software, you can impact one, two or all three of these areas

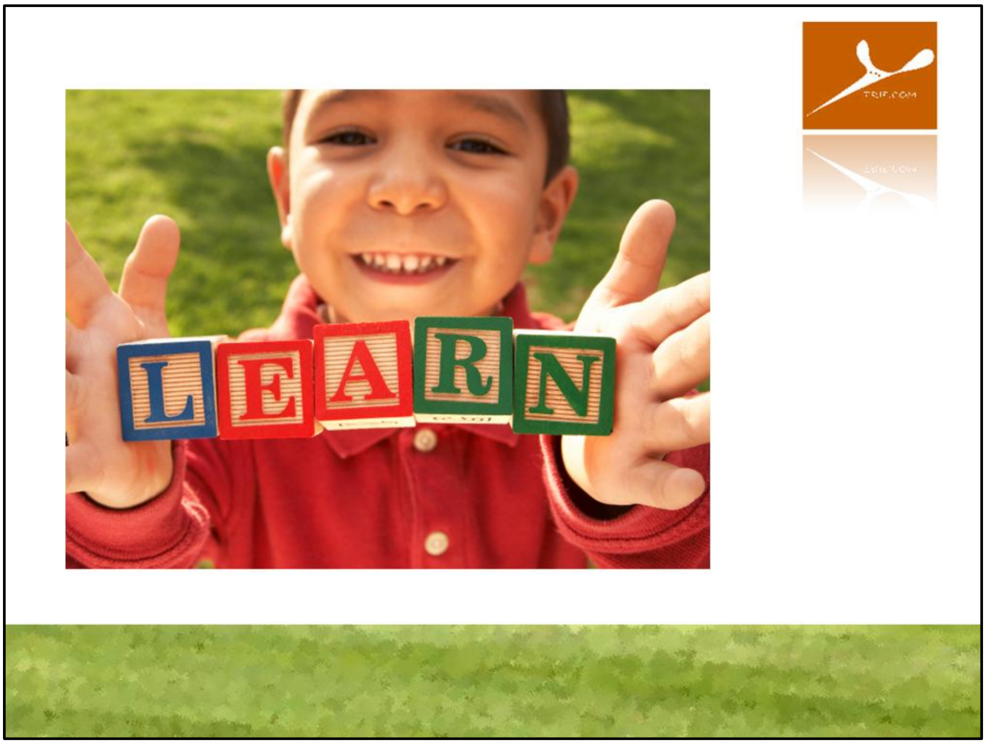


And you can affect change on not only your customer, but with a bit of hard work, you can impact others in the supply chain or service chain –

-- Including other departments or even divisions within our customers company
-- including your customers customer,
-- and even customers’ vendors

So the more people and functions we can touch with our added value, the more embedded we become, the more value we create, the more permanent our connection

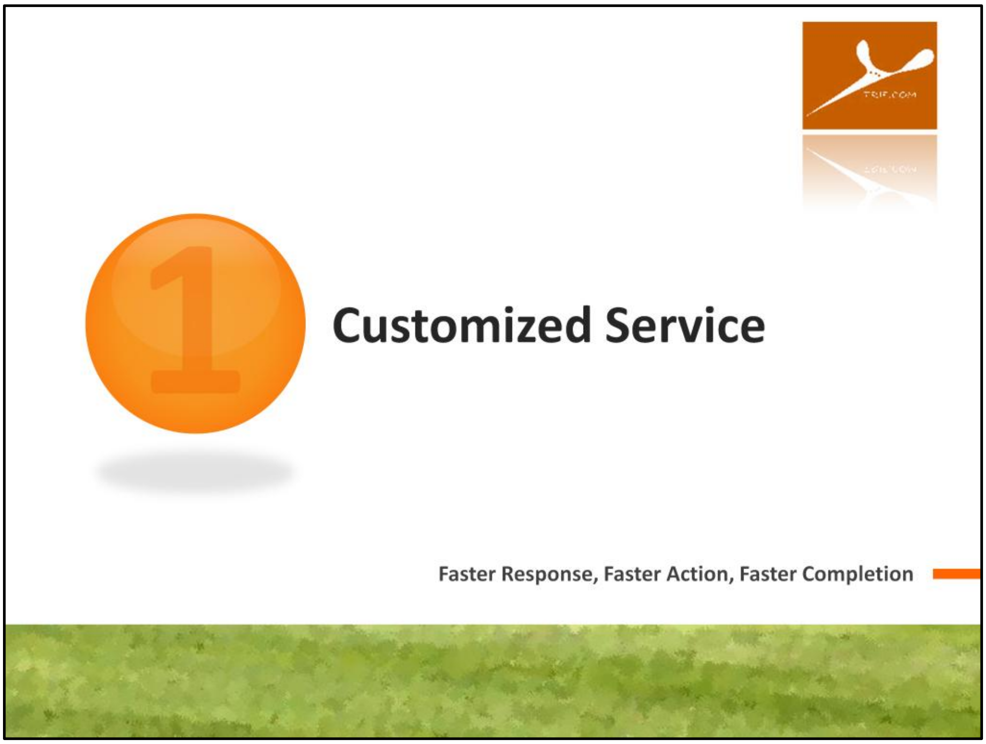
Here is the biggest thing you can do to enhance your relationship with your customer.



Learn.

Learn as much as you can about how your customer works, how they communicate, who the players are, what tools they use to pass along information. How they collaborate. What information is important to them. Always be thinking “what one thing could I do that would help not just one person, but many people”. What could you do that would simplify their lives. What could you do that would improve relationships within their organization. What could you do that would allow them to see things from a different perspective. In what ways can you improve service, communication or the exchange of information that would make a lasting impression on not one, but lots of people in your customers organization.

So let’s get into some specifics.



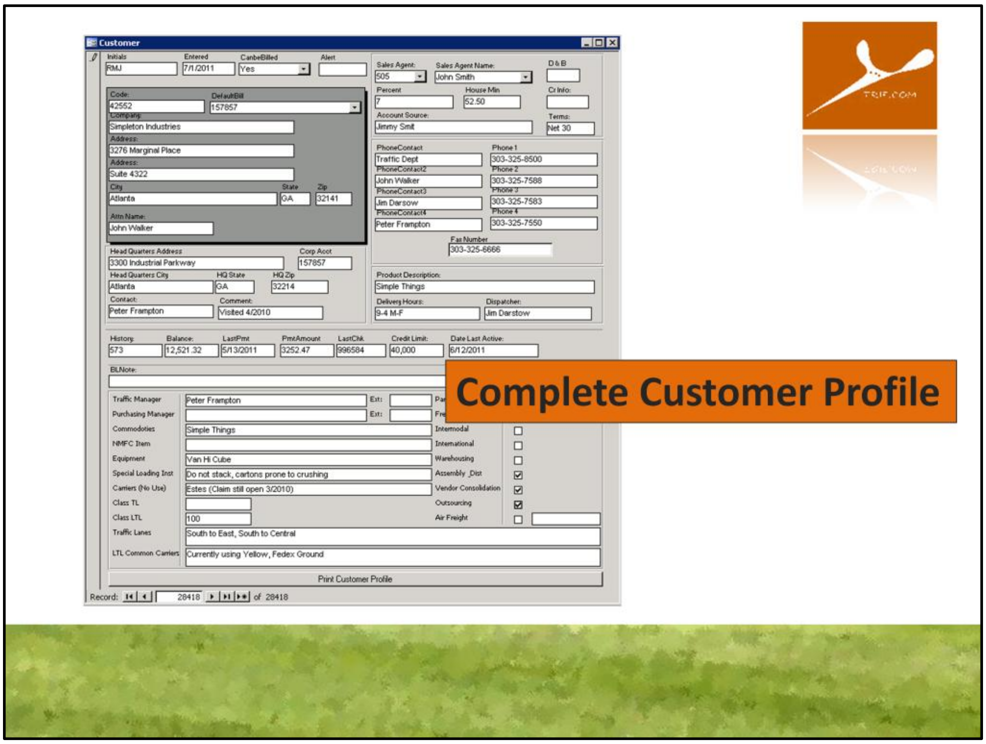
Service can be impacted in a number of ways using software

Next to pricing, service tends to be the most customized aspect of any organization in differentiating themselves. And rightly so, it is the most obvious.

But a big part of the service component is overlooked because most companies don't take a really close look at what their prospect or customer really needs.

There are CRM solutions that help to build a better understanding of your customer, their activity and systems to promote better follow through.

Link them with good operational information and you can become better informed about your customer . Better than even your customer



Service begins with understanding who you are having a conversation with and that means a complete customer profile that contains the information that is important to know specifically between you and your customer.

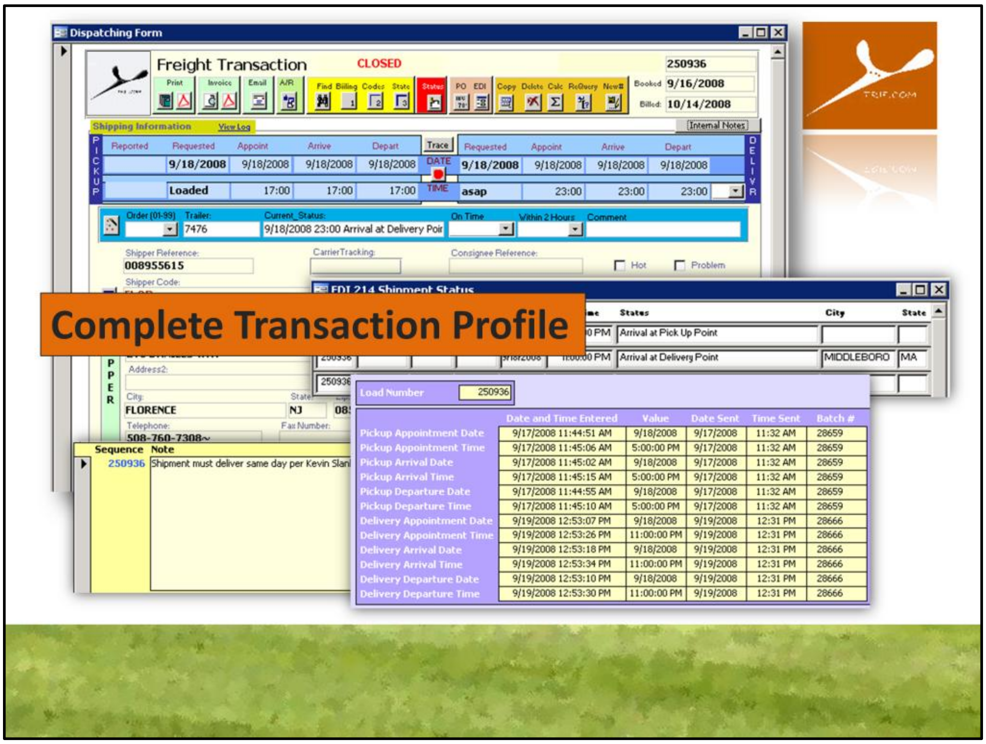
The more you know about your customer, the more you can help.

You can do this with a complete customer relations system – CRM
Or we can create a customized customer profile –
And why would we create a custom profile? Because you might not care about traffic lanes or traffic manager --- in your business you might need to know the size of their yard or the number of windows they have or how many times a year you service them, or the last time you spoke with them.

In the end….

- It means knowing if there are problems,
- The date of last activity
- The date of the last invoice
- If the balance due is within acceptable limits and
- If payments are being received and when the last payment came in
- It also means that at the transaction level, everyone who deals with the customer is on the same page
- It means that you aren't the only person that can deal with the customer. Other people can look at this and know what they need to know.
- And anything else that means something in your business

This is just one example of a **static customer profile** -- that is informative for this client. It is unique to them.



As important as the static information, we probably need to know things about specific transactions or service tickets

This moves us beyond the limits of a CRM system and into the realm of operations software. This is an example of a transaction profile. Just as important as the static customer profile – maybe more.

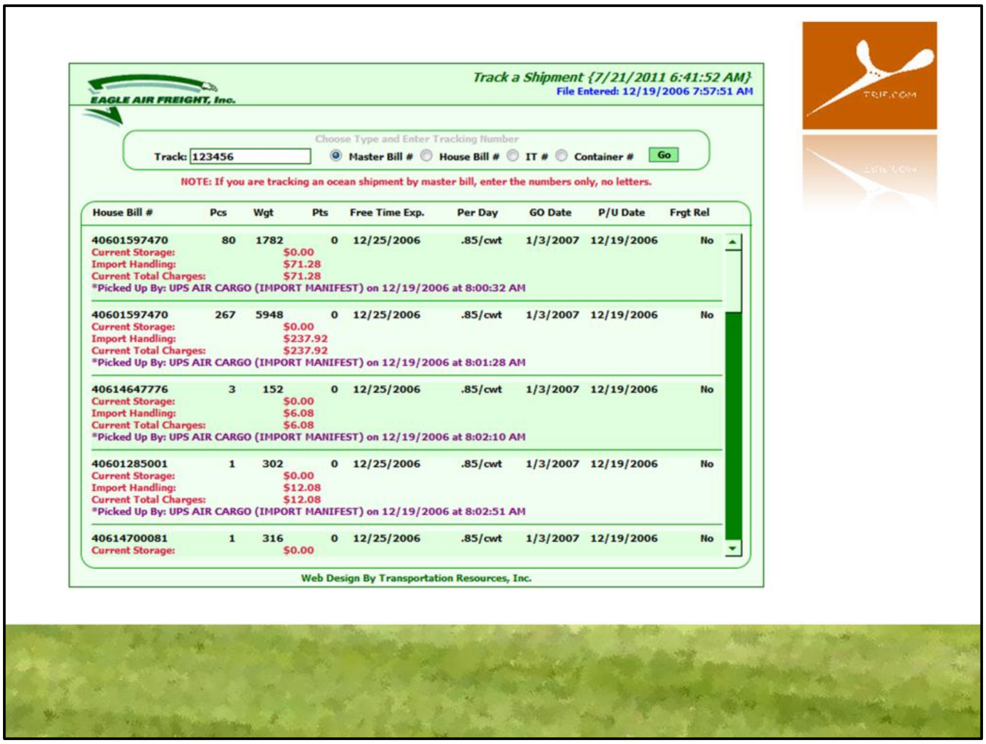
That is really valuable when your having a discussion with your customer -- you need to know as much or more about this piece of business as they do

- for single contract or service, we might want to know
    - the service that was performed
    - how it was handled
    - If there were any comments by us or our customer during the performance of this transaction
    - Length of service
    - Date and time landmark events
    - Event tracking

No matter who looks at this transaction, in a split second they can determine a lot of important information. For this client, the most important info is the date and time of every landmark event, transaction specific notes, the electronic data interchanged and then the specifics about the transaction

Would this form work for the relation between you and your customer? Probably not. All transactions and services are a bit unique.

So the key is creating a customer and transaction profile that suits your business model



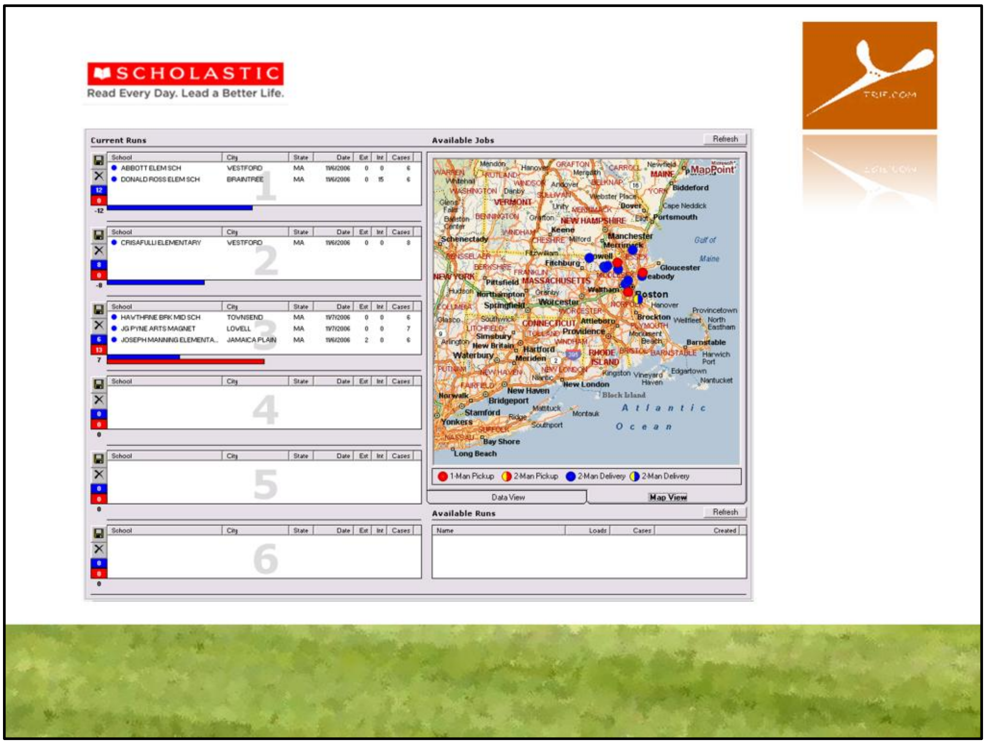
We can take this one step further and place some of this information at the fingertips of the customer via the web.

Maybe it's important for you to allow your customer see very specific information about a particular transaction or service whenever they want without getting on the phone and waiting for you to find the information and fax or email it to them. Maybe you need to provide a more direct root to the information.

Maybe this could be a crucial part of your service offering. And depending on your business, it might be very very unique.

For example, are you able to go online and check when your next hair appointment is? Can you schedule a visit from your house cleaner on the web? Probably not. But wouldn't that really set them apart from other hair dressers or cleaning services?

We want to think out of the box in an effort to service our customer in a special way.



We may want to bring technology to bear to improve our ability to service a customer

This application was an add-on to a warehousing and inventory control system we wrote for a distribution center. It helped manage the distribution of scholastic books. You probably know how Scholastic works, they bring in a ton of books to schools for book fairs and sell them to the kids. After the book fair is over, the remaining books get picked up and brought back to the barn. This program handled about 100 mile radius of Boston. So there is a flurry of activity for 6-8 weeks and then all is quiet.

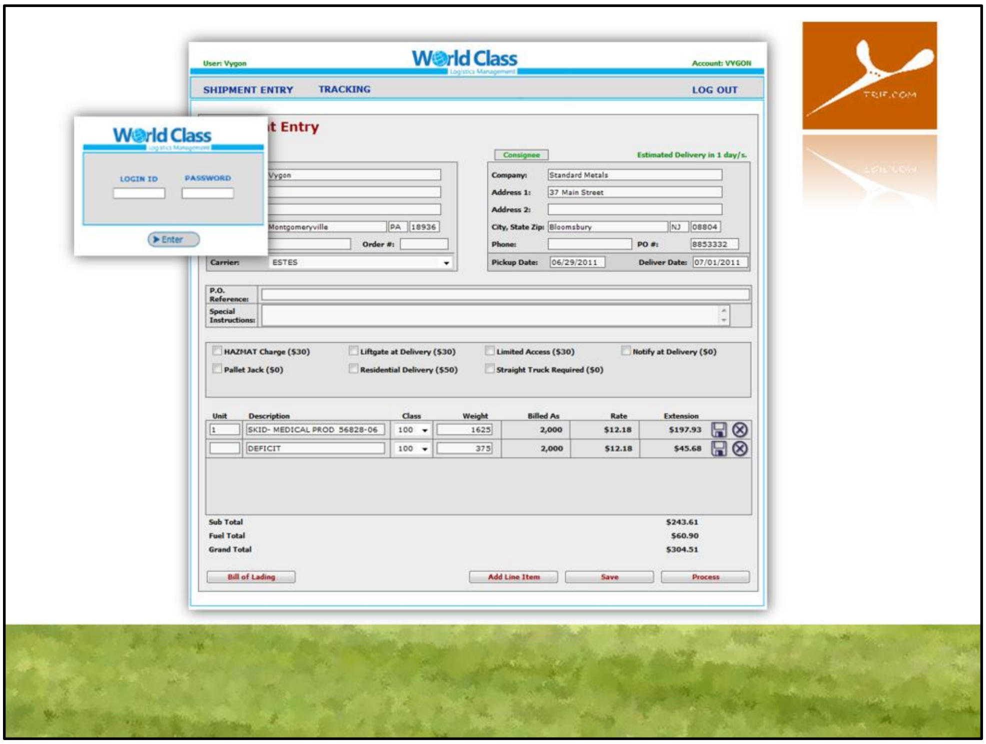
Our application received order data in a spreadsheet that had the delivery and pickup windows, the number of trays or pallets and it also identified if that school required a stair carry which meant 2-men would be needed to make the delivery or pickup.

Our software would plot pickups or deliveries that fell within the next few days on a map and coded by color – red for pick up, blue for delivery and full moon for 1 man or half moon for 2 men

The dispatcher could plan up to 6 loads at one time by dragging shipment icons from the map to a particular load. As the shipment was added to the run, the number of pallets were added and the capacity remaining was displayed. The icon would disappear from the map.

The dispatcher was able to quickly see activity, location and manpower requirements and he was able to select orders that were close to the last stop.

This was a very customized application for a very customized service, but it really simplified the execution of this service and increased the efficiency and profitability of the contract.



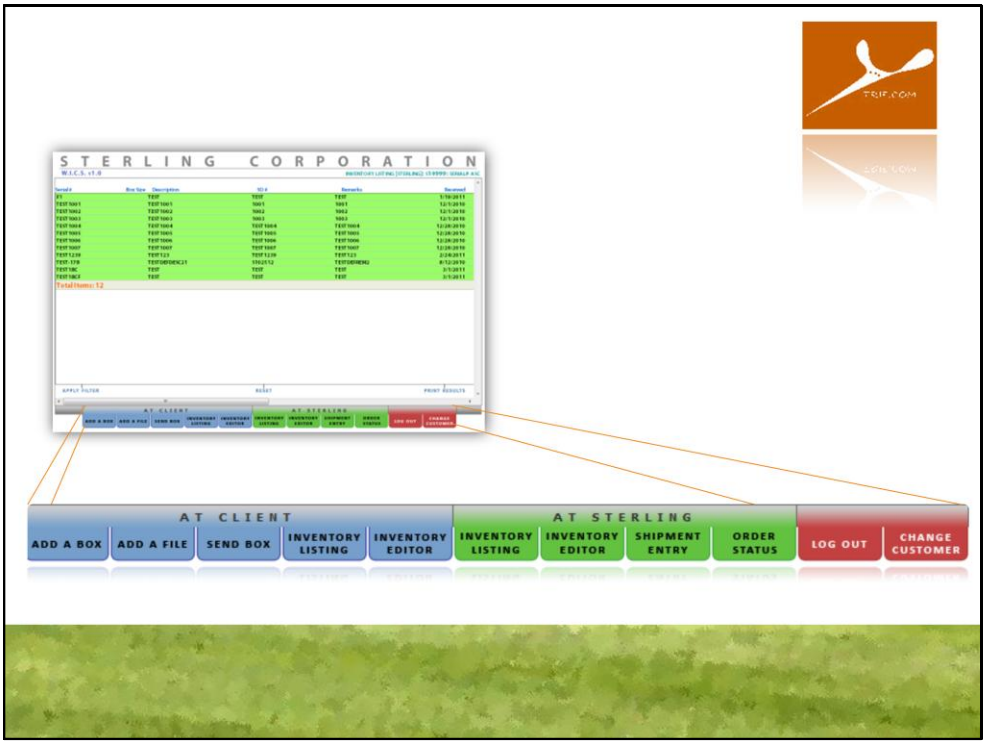
We can use the Web to connect the customer to a very customized service making it easier, more efficient for the customer to transact business. One of the by-products of this kind of order processing is that you don't need to handle the scheduling of this transaction yourself. It is a self-service tool which can be customized for a specific customer.

This is an example of an order entry system for a 3rd party logistics company. A 3rd party logistics company arranges for transportation and in this case provides specific carrier options.

The customer logs in to this portal and based on their login, the application is configured with very specific service, pricing and carrier options. The information includes services levels from origin to destination and the transportation rates that apply along with pricing for special services that are unique not only to the customer but the carrier that was selected.

So it is basically a customized on-line dispatch system, including shipment rating and assessorials specific to that customer. It also produces documents like bill of ladings and behind the scenes instantaneous emails of the bill of lading to both the carrier handling the transportation and the 3pl arranging for the transportation. Lastly, it uploads the transaction data directly into the 3pl Freight Management System. It is fast, easy and effective. It also places the onus on the customer for accurate data entry. It reduces telephone time, fax time, people time and use of paper.

And all the while, the customer is getting the service they want.



We have produced a few record storage systems and the most crucial aspect of all of them is the ability to provide the customer with a very custom interface that allows them to manage all of the records, all their folders and all of their boxes --- no matter where they happen to be in the pipeline.

This Record Storage Web Portal was done for Sterling Corporation. It provides all the basic record storage features you would expect.

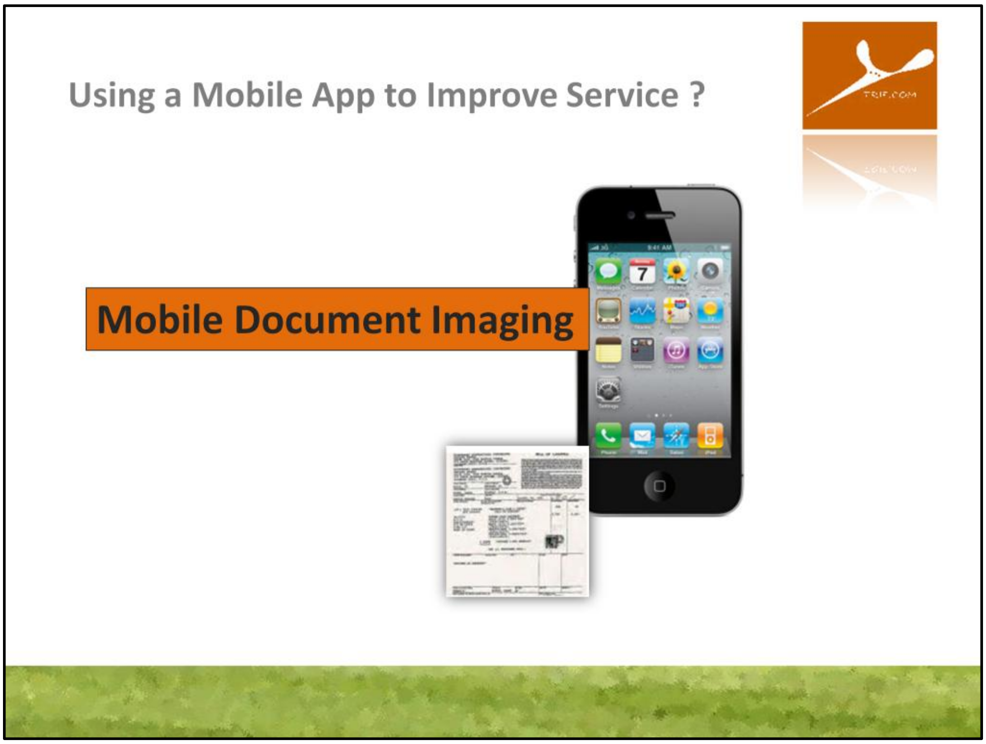
But it also gives their customer the ability to manage records at their own facility as well as those stored off site at the warehouse. This is a huge benefit to companies that have short term storage on their own site and long term storage off-site. When it comes to finding the documents they need, they can find it no matter where it is in the system!

Also, the software has been created to allow for user-defined fields. So that a law firm could assign docket numbers or case numbers and an insurance company could assign policy numbers.

The bottom line is that a client of Sterling can control their own inventory! They can create, search, view, manage, destroy, ship and order – from their desk, regardless of where the documents might be.

So what we like to do is help our clients think out of the box. We especially like to bring new technologies into their business to help them create a service that is more unique than their competitor.

We love to use new technologies to accomplish this. For some industries, the web is new, for some – mobile devices are new. For others mapping.

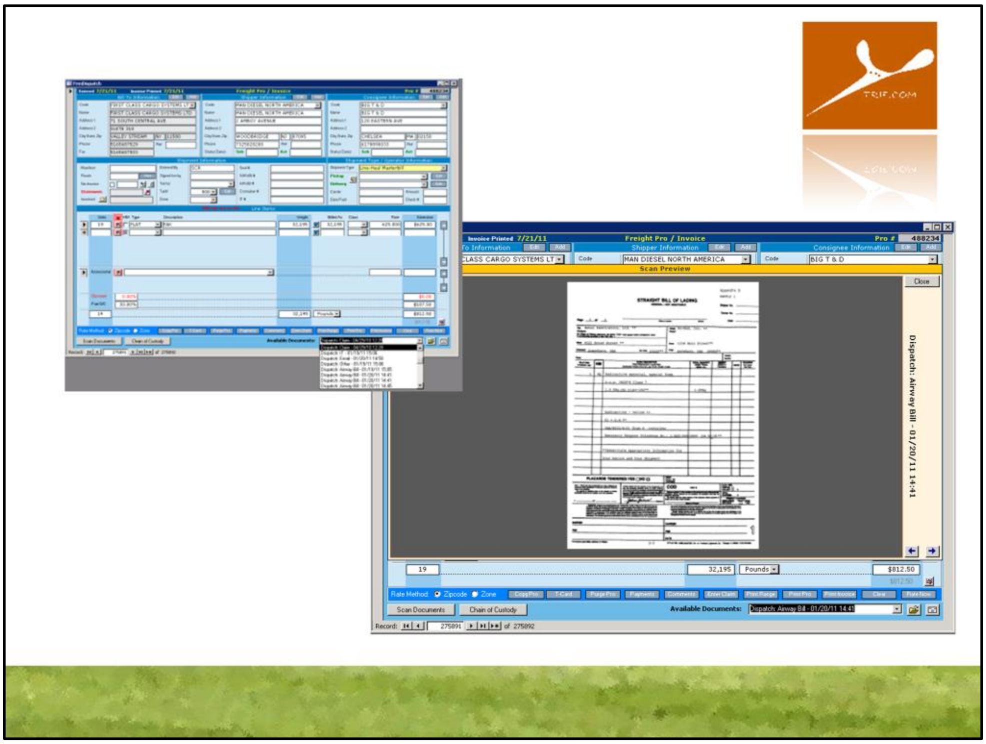


Another is the use of the mobile camera

It is a little used tool yet most mobile phones are now capable of taking a high definition picture and emailing.

- I think Emailing or texting pictures of documents will become the norm rather than the exception.
- It’s accurate, efficient and very simple
- It also helps promote a faster cycle from product or service delivery to billing

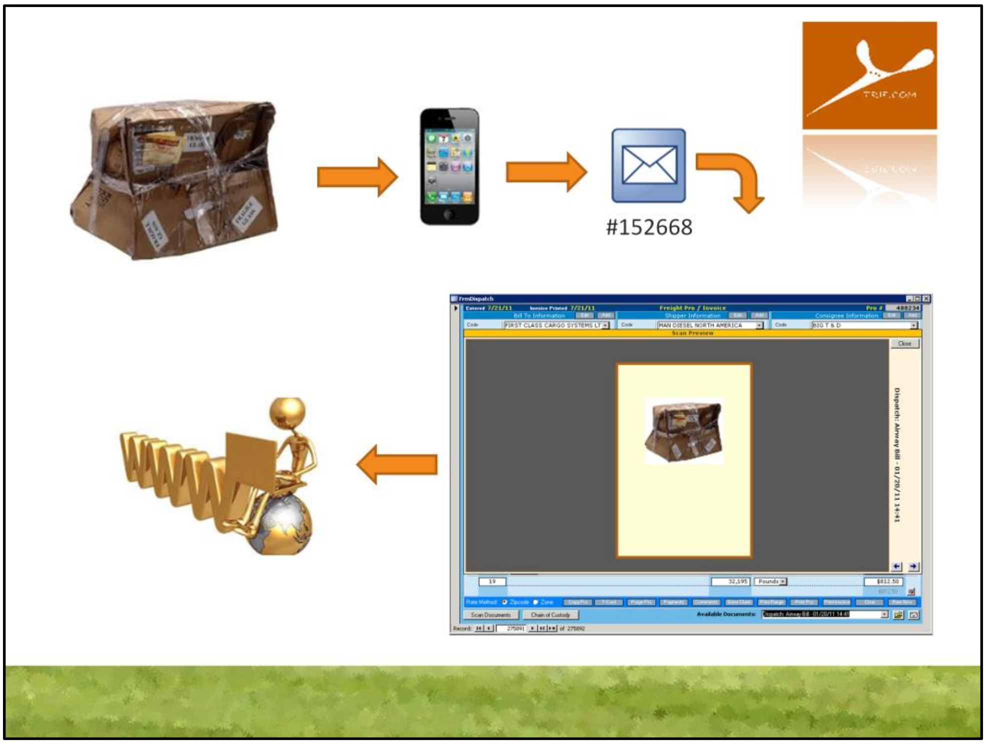
Using a web application on a mobile smart phone to record names, enter arrival times, confirm pick ups and deliveries are all possible no matter what business you are in.



So here is an example of how we connect documents to a transaction.

For the most part, these documents are scanned at the customer site.

---- Describe the form ----

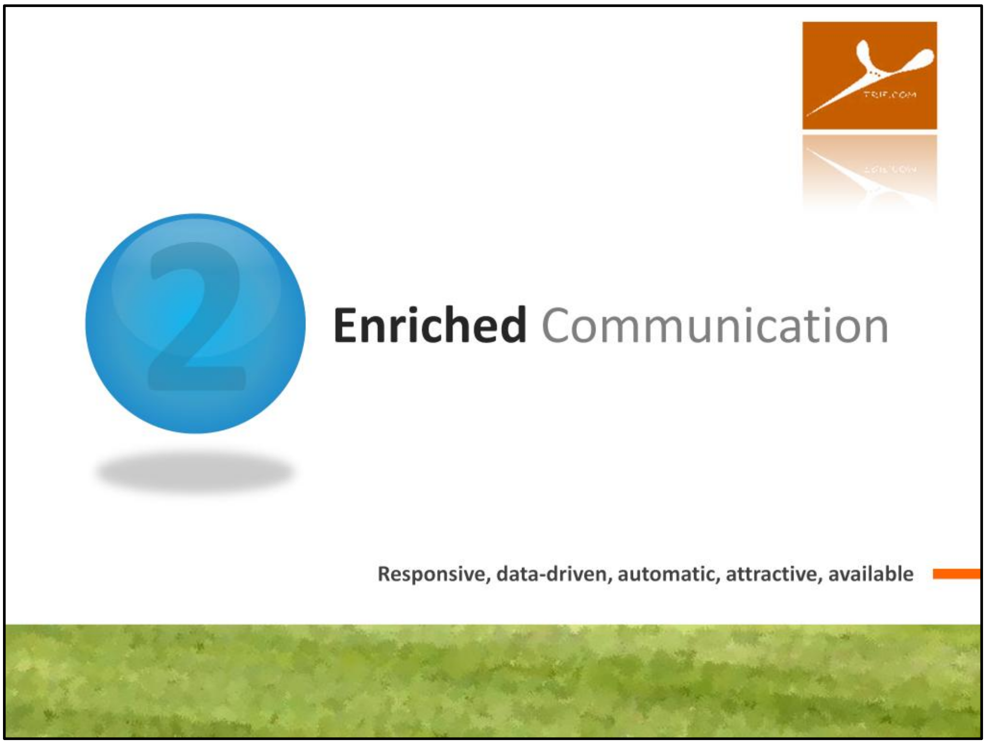


We also provide our clients with the ability to have documents or images auto-linked to a specific transaction as part of an email. For example, there is an application we created for a client and can customize it as needed.

It's combines the flexibility of email attachments with document imaging.

Here is an example of how it can be used.

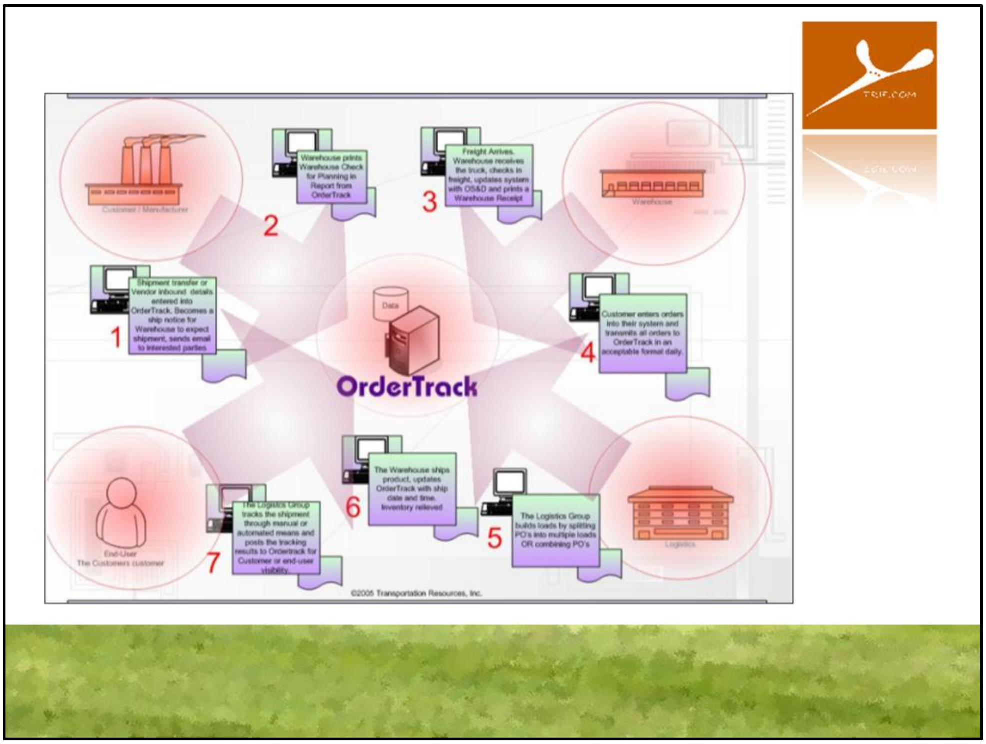
A driver in the field can take a picture of a document, a damaged carton or a spill --- and then email it to docs@yourcompany.trif.com, the driver needs to place the ticket or bill of lading number in the subject line. When that picture is received, the picture is separated from the email, saved to the file server as a PDF document and saved as part of the document imaging system connected to that transaction. And take it one step further that image can be displayed to interested parties instantly on the web.



The next aspect of customer relations to impact with customized software is communication

This might be the most natural and compatible for new technology and what you would think of first.

Customized software allows you to communicate in a very special way with your customer and that special bridge you build (although always replaceable) can be resilient to storms and bad weather – if you know what I mean.



This slide, although a bit complicated describes a logistics process that occurs everyday between different companies, but not usually in such a cooperative way.

Our client, a third party logistics service provider dreamed this up as a way of distinguishing themselves as unique.

This is really a collaboration between
our client, the *3PL company*,
their customer - *the manufacturer*,
the 3PL selected vendor for storing the product manufactured -- *the warehouse*
another 3PL selected vendor the *carrier* transporting and delivering the product
and lastly the *manufacturers customer* – in this case companies like Walmart, CVS and Dollar Stores.

Our client saw this as a way of collecting a management fee from their customer for handling all the logistics needs. They also received a percentage of the warehousing and transportation as a result.

More importantly, our client's customer had direct and immediate access to the entire order cycle from the line to the store.

	Load No.	Part No.	Description	Pcs	Len	Total Feet	Stg Location	Date In	Remarks
1	R8/KK	12007AQ2MV	9.00 OD x .625 W AL 6101-T64	9			RSIOXF	1/22/2010	4 @ 3
2	R12/13	12007CJ1HM	"12.0"" OD x .25"" W x 38' L AL6063-T6"	33	38	1254	RSIOXF	1/23/2009	
3	R12/113	12007CJ1HM	"12.0"" OD x .25"" W x 38' L AL6063-T6"	34			RSIOXF	4/17/2009	Mix 21 @ 10'
4	R2/16	1845B772PB	20.00 OD x 19.50 ID ALMG3	20	38	760	RSIOXF	1/23/2009	
5	R2/151	1845B772PB	20.00 OD x 19.50 ID ALMG3	10			RSIOXF		Mix 9
6	R5/136	1845B773ES	24.00 ID x .25 W ALMG3	8	60	480	RSIOXF	8/3/2010	
7	R5/101	1845B773ES	24.00 ID x .25 W ALMG3	9	60	540	RSIOXF	3/5/2009	
8	R2/123	1845B774A2	26.00 ID x .31 W ALMGS	9	38	342	RSIOXF	6/4/2009	
9	R2/128a	1845B774A2	26.00 ID x .31 W ALMGS	6	38	228	RSIOXF	8/11/2009	
10	R0/2	5674C77G01	Shipping Cap - Socket	1	0		RSIOXF	2/23/2009	

This example is a custom yard inventory system

The product comes in on ocean containers from China, it is picked up by our client and is stored at their outdoor facility for the customer
The customer is a bit in the dark on what is actually picked up – It is our clients job to survey the makeup of the product received and report back with the specific details

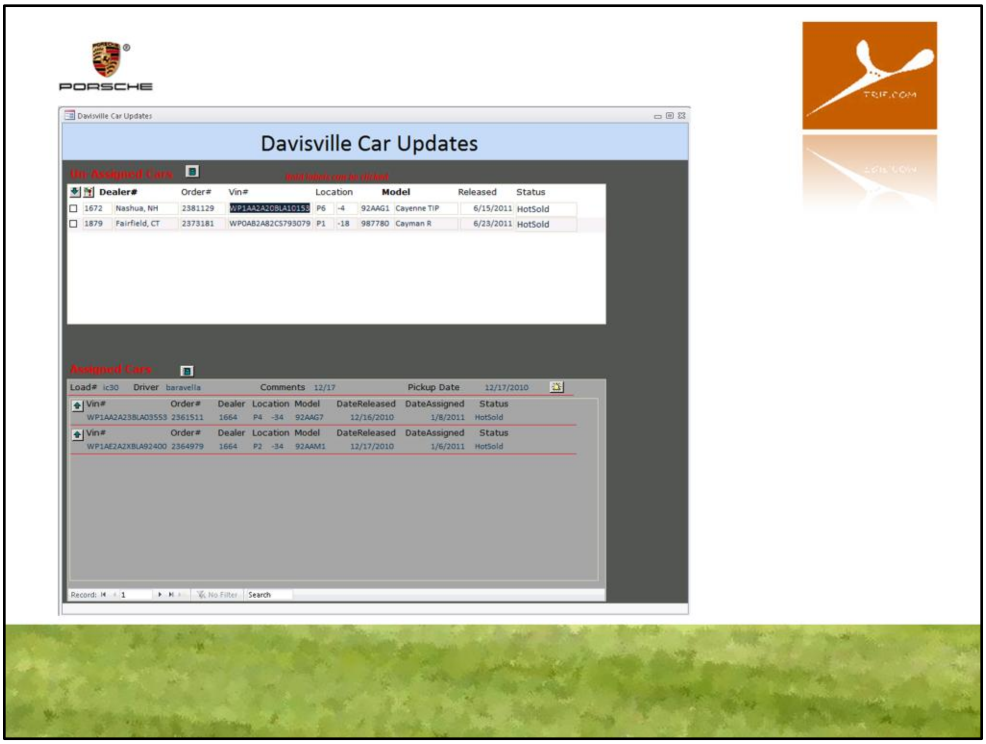
They use a custom inventory control system we created for them with a custom web portal. It allows the customer to view the inventory real time
It is more than just standard inventory information like pcs and item number

It contains dimensions, length, the load it was received on and the specific location in the yard.

The information is valuable not only to logistics but also production.

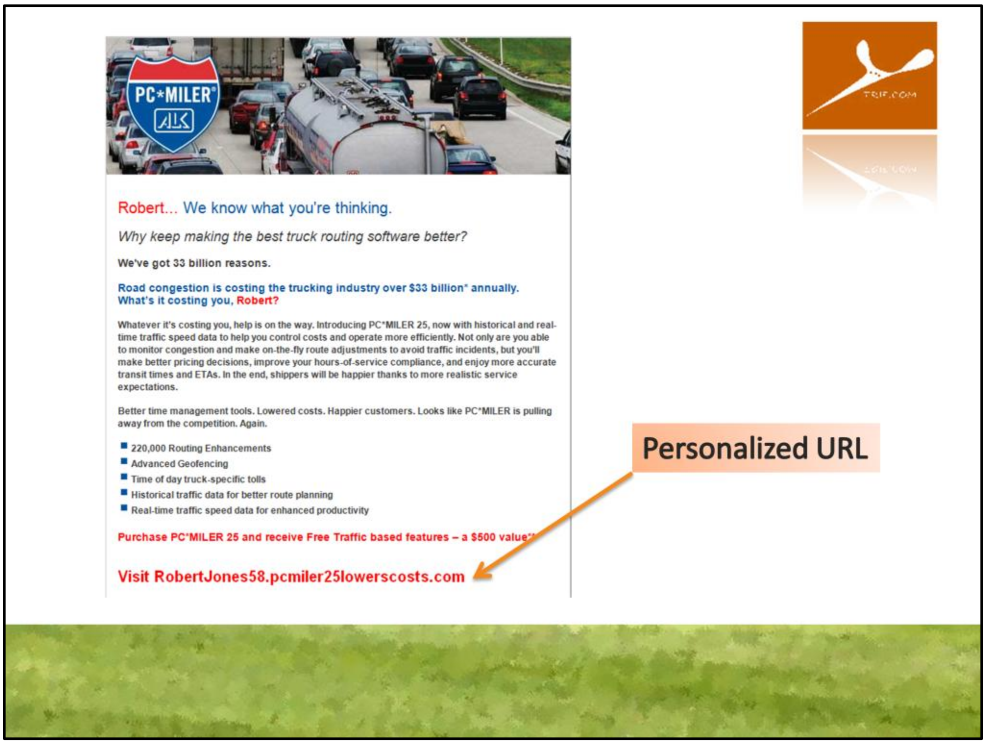
This used to be handled by swapping Excel Worksheets. We know how cumbersome that can be.

Our client chose to take that extra step to make the information available in real time 24 x 7 x 365.



Our client had a need to track all Porsche vehicles coming into the Port.
We worked with a company known as Norad to setup communication with the Port.   Norad setup an hourly FTP dump that drops a file with vehicle information onto our clients server.

This file is immediately parsed and processed into the vehicle management system and dispatchers can access the data and perform various tasks like scheduling and status updates. They have near real-time visibility of inventory as it comes into the port. It's there job to move it to the appropriate destination as quickly as possible.



I wanted to talk a little bit about personalized URL'S. You can setup a database of let's say names, email addresses, and some distinct information and then create custom web pages that use that information to customize the display of information for the recipient.

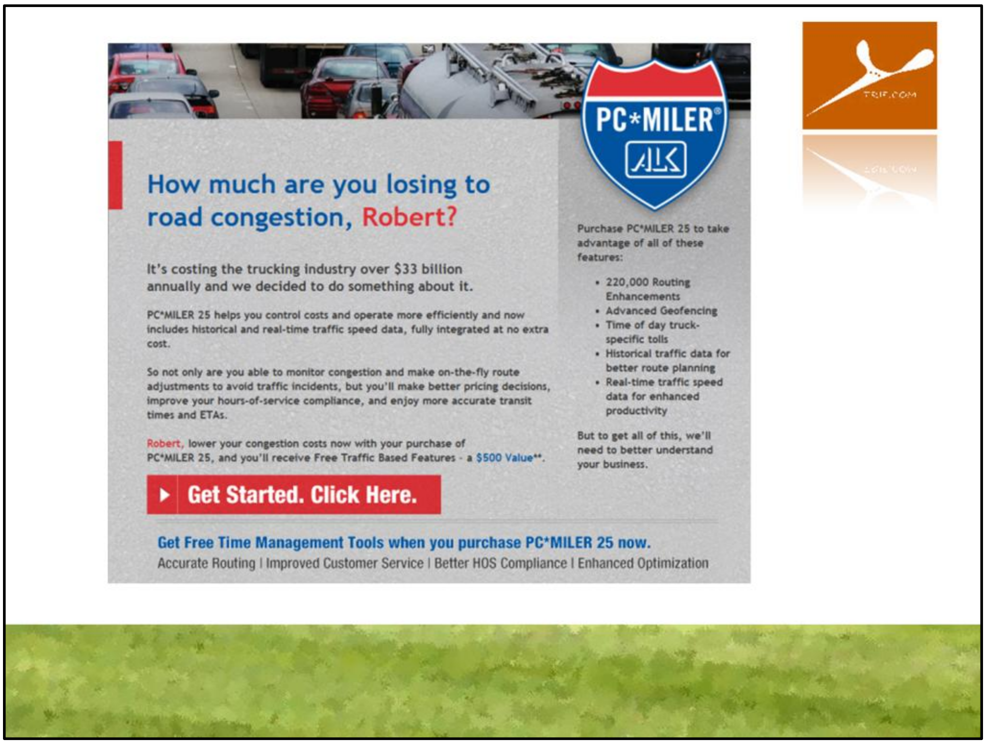
Here is a very bad example of how that can be used. Mind you, we didn't create this.

PCMiler knows my first name and my email, they sent me an email with a special link to a personalized URL.

Here is the problem, that is pretty much all they know about me, so the degree of customization is slim to none.
They also seem to know at least 58 other Robert Jones's. Thus the URL robertjones58. Did this make me feel special when I received it? Uh… Nope.

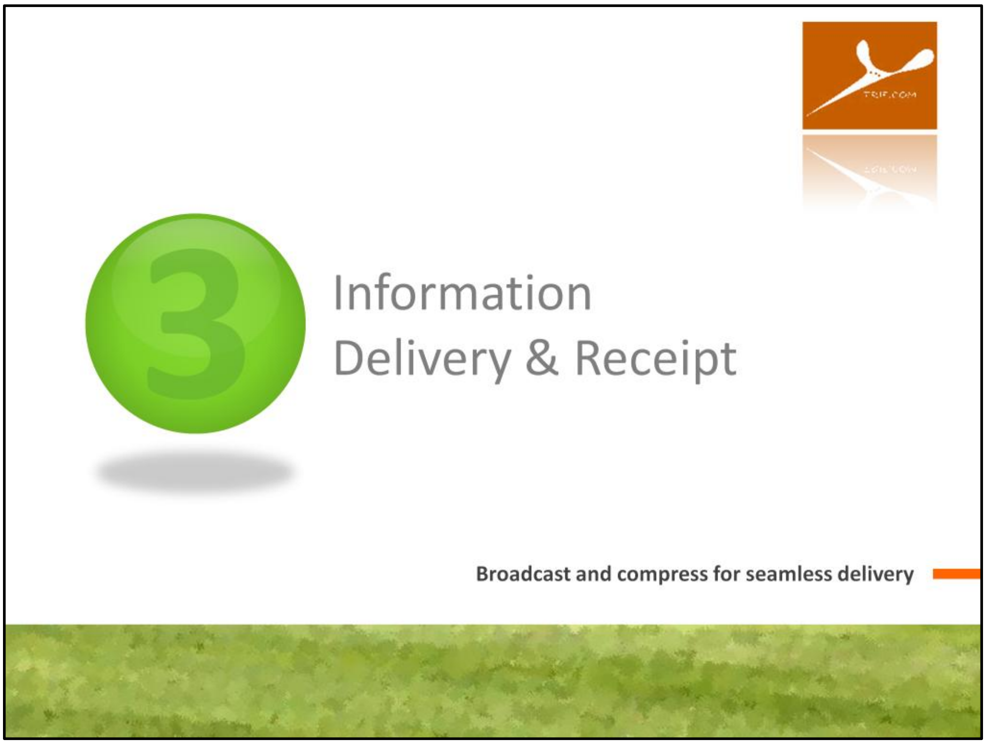
Although the concept of Personalized URL's is cool.

You need to do it right for it to be effective. It needs to be more custom than a first name.



And here is my customized web page.   They inserted my name in 2 places.

Not really so personal and kind of a waste of time and effort on their part.



Custom information is probably the most common method of providing a custom connection to your customer

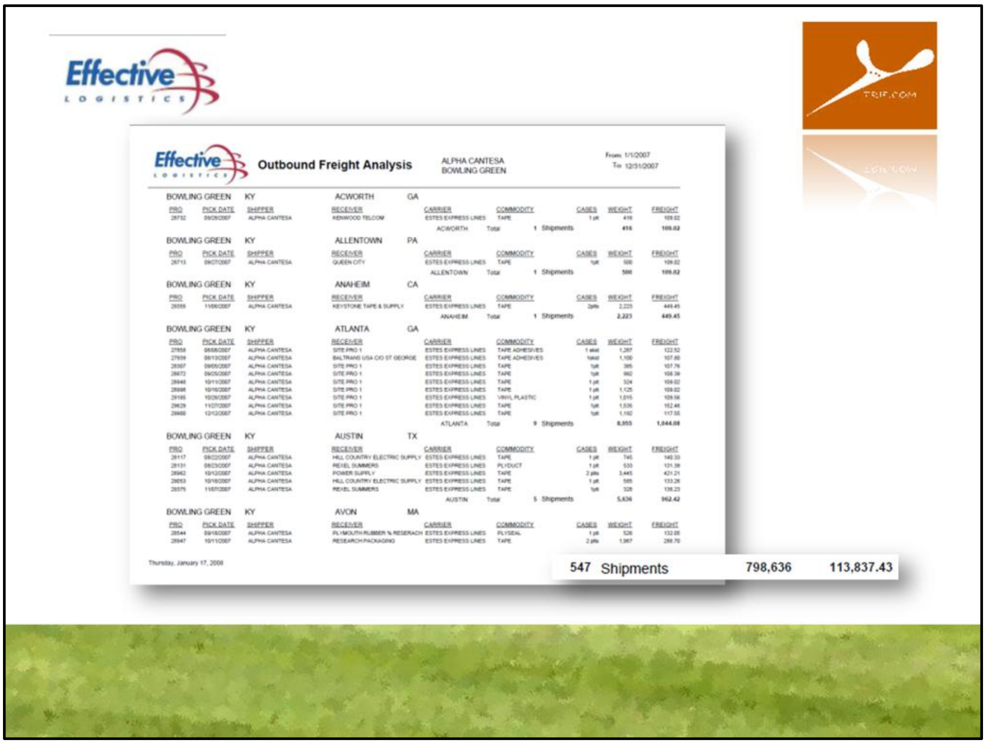
There are too many examples to display and the pictures wouldn't be very pretty but we have written hundreds of custom data integration utilities for our clients.

Creating a custom link to your customer might come in the way of accepting or sending information or transforming or compiling information.

Data integration tools help connect our customers to their customers so information passes seamlessly. And at the same time, it requires legwork to replicate somewhere else.

We often deal with files like PDF's, Excel, TXT, DATA, EDI, DOC, CSV and other formats

You never want to turn down an opportunity to accept data input from your customer. In the end it saves time, improves the flow and accuracy of information and adds one more link to your customer



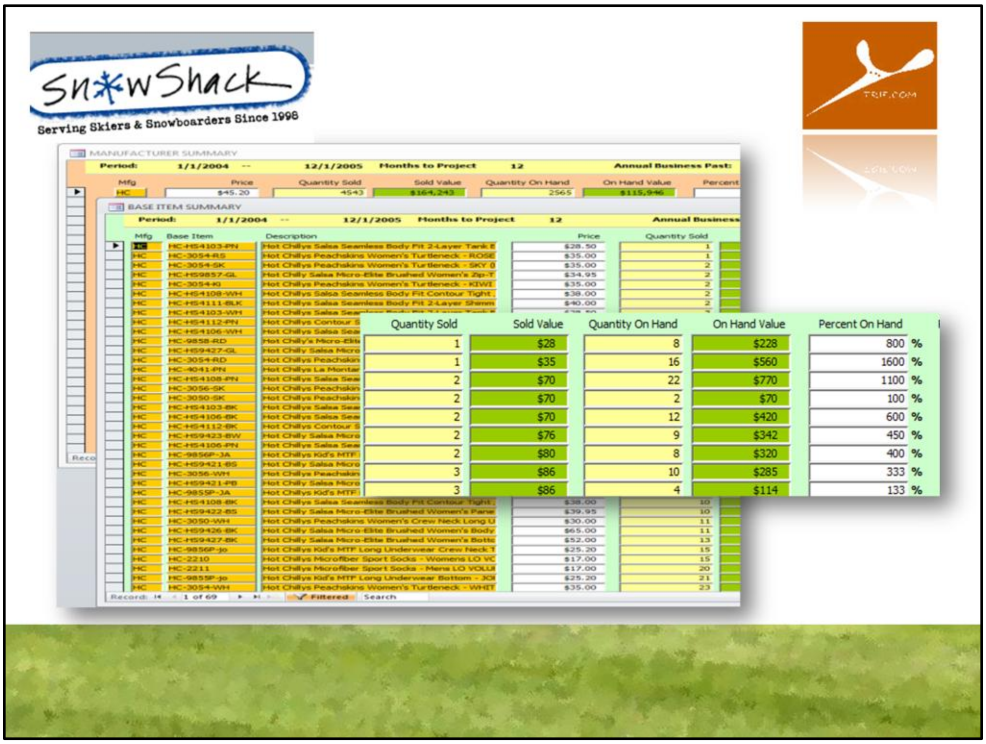
Custom reporting provided in PDF format specific to a clients needs is very common

This report is for a 3rd party logistics company and provides complete shipping detail for a customer by plant location for an entire year

With totals by plant and grand total freight expenditures for the entire company.
This is a great benefit in controlling all traffic!

This is a pretty complex group of queries that are used to provide quarterly information about inbound and outbound, import and export, and domestic volume with averages.

It is unlike anything that we have ever produced. It takes a dozen queries to establish these results but it gives our client the information his customer needs.



This is an example of communication and information gone wild

Our client was the distribution center for Snowshack. Snowshack was an online-only store using the Yahoo store engine

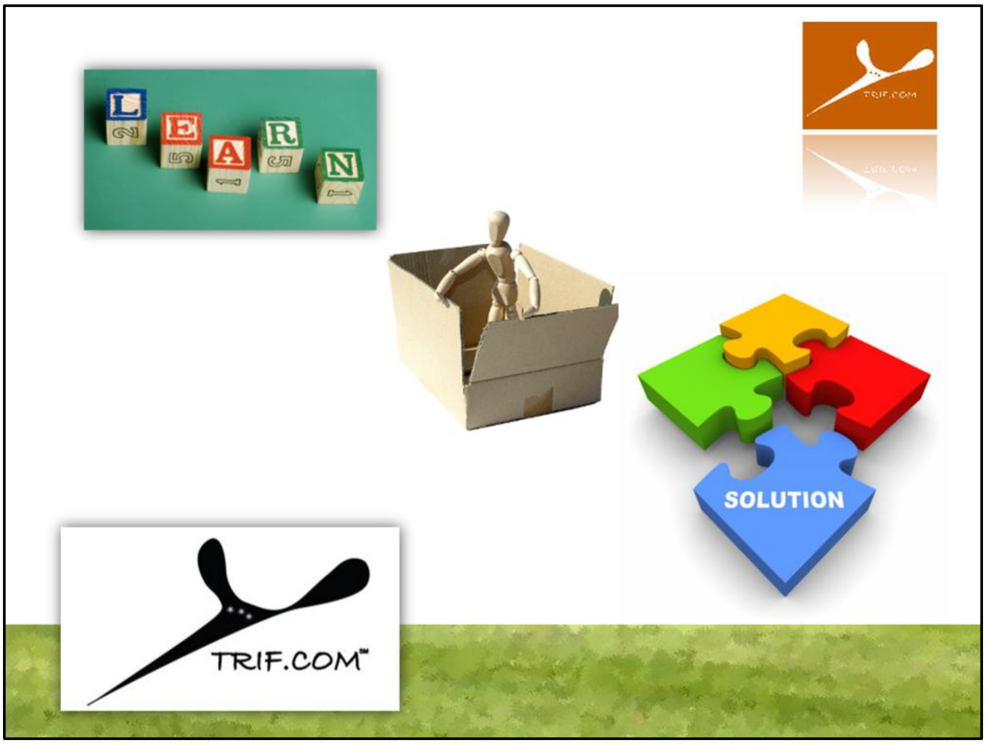
Snowshack used QuickBooks Accounting which has a very basic inventory control system. Insufficient for their needs.

Since we wrote the software that managed the inventory control for our client, we were able to provide Yahoo real-time inventory information

So we wrote a custom application that connected our client to their customer Snowshack to Yahoo and Snowshacks customer. We also managed all the inventory and transport aspects of transactions created on the Yahoo Store
We linked that to Fedex and UPS computers in our clients facilities and obtained tracking information which was reported back to Snowshacks customers via a custom web application we developed.

Snaowshack took all this one step further and we were asked by them to create requirement planning software that told them by manufacture and by item how product moved in the past, what should be ordered, what should be reduced for quick sale

After we were done, SnowShack sold there little online store to SureSource LLC and the two founders happily retired



So we end up back at the beginning. How do we enhance our connection with our customer?

The steps are pretty basic… but take some effort

- We learn as much as we can about our customer and what their needs are
- We think out of the box
- We devise a solution that helps our customer in a special and unique way
- Use custom software so it doesn't create more work, just more results