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CHANNEL SALES GUIDE: VisNetic MailFlow

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THE VALUE OF EMAIL MANAGEMENT

As a company's email volume grows, so must that company's means of handling it. As companies increasingly seek to utilize email for functions like product support, sales and other critical business processes, their need for accountability, flexibility and tracking also increases.

Today, business managers are seeking more information than ever about how their company can efficiently handle email correspondence with customers and vendors. For example, they need to know how many emails each agent processes, how many are currently left unanswered and much more.

Organizations also have a strong need to distribute email workload among individuals and groups. Emails need to be easily disseminated among these agents, with established rules to guide their routing. Agents should also be able to share common responses to frequently asked questions. And, all the above should be accomplished *regardless of physical proximity*.

As part of the new VisNetic Messaging Suite, Deerfield.com introduces VisNetic MailFlow, an email management system developed to address such customer service issues and provide the following benefits:

- (1) Increased email agent productivity and accountability
- (2) Enhanced accuracy, speed and consistency of email responses
- (3) Fostered relationships with customers
- (4) Reduced support costs through increased business intelligence

WHY SHOULD YOU SELL VisNetic MailFlow?

A recent study by Gartner Group indicates that more than 90 percent of businesses are not adequately prepared to handle customer email volumes. Companies are outgrowing the functionality of standard email clients and now require a central

location for data, effective collaboration on workload, informative reporting capabilities and so on.

As a Deerfield.com Authorized Reseller, VisNetic MailFlow can provide your customer with these benefits and more; it can also provide you with a number of exciting opportunities to boost profits, maintain customer satisfaction and increase account loyalty. Some additional reasons to recommend VisNetic MailFlow are:

This Next-Generation Product has the backing of Deerfield.com, where product development is centered on the identification of solutions that leverage Internet connectivity for its intended purpose, as derived from *actual* customer needs.

It's a Natural Solution for companies that receive large volumes of email, especially those with contact centers and/or customer service departments responsible for responding to email requests from customers.

It Provides Real-World Benefits to your customers by saving them time and money, increasing productivity and maintaining brand and message consistency with customers.

It Generates Revenue from new and existing accounts requiring improved email management. It also provides opportunities for purchases of complementary products such as mail servers, antivirus solutions and more.

Target Audience

IT Managers and/or Chief Information Officers [CIOs] in small to medium-sized businesses, who are dealing with ever-increasing electronic interactions, are excellent prospects and important sources for sales opportunities.

Most companies have email addresses like sales@company.com or info@company.com, but are unable to answer some basic questions. Some qualifying questions to ask IT Managers and/or CIOs are:

- *Are email inquiries being answered promptly?*
- *Are customers being given accurate and consistent responses?*
- *Are you tracking what customers are telling employees, for future use?*
- *Would you like to create standards and conventions for handling email?*

Market Position

To effectively sell VisNetic MailFlow, it's important to understand that it is not a customer relationship management [CRM] solution. Rather, VisNetic MailFlow is an email management system for companies that receive large volumes of email from customers, but cannot (1) rely on a standard email client (like Outlook) or a contact management solution (like ACT!) capable of handling only a fraction of the

interactions needed, or (2) justify the high cost or complication of a complete CRM solution.

VisNetic MailFlow is an ideal solution for small to medium-sized companies with contact centers and/or customer service departments with a particular need for centralized mail store management and backup. Using MailFlow, workgroups can easily manage messages sent to generic email addresses such as info@company.com, support@company.com and so on. MailFlow also provides many useful tools for workgroups, ensuring that your customers can provide consistent and personalized service to every one of their customers. In addition, MailFlow uses an intuitive web interface and is easy to deploy throughout an organization.

Sales Scenarios

Your customers can benefit from VisNetic MailFlow in a variety of ways, which create the following sales scenarios:

Measuring effectiveness of employees' email correspondence

Situation. There is a high amount of unproductive time being spent with each contact in your customer's branch offices or departments because their customers must "start from the beginning" each time they describe their request to an agent.

Solution. VisNetic MailFlow allows agents to manually create or be assigned "tickets" (defined as a conversation on a topic between the company and an external person/customer). Once a ticket is present in the agent's ticket box, the agent can choose to compose or reply to a message - or manually open, close, or delete the ticket. Deleted tickets go to a wastebasket that the system administrator can empty.

Other ticket options include forwarding to another agent for collaboration and viewing the history of a ticket to see all the messages and notes that comprise it. Agents can also escalate a ticket to their designated supervisor if necessary. To ensure overall effectiveness, administrators have the ability to review communications between agents and customers.

Benefits. Increased email agent productivity and accountability.

Applying management standards across the board

Situation. There is a disparity between customer service operations throughout your customer's organization and they have no way of applying consistent management standards across the board.

Solution. VisNetic MailFlow provides your customer's staff with the necessary tools to quickly and easily compose timely, relevant, and consistent email messages. Users can create a centralized "Standard Response Library" of answers (with attachments, if needed) to customers' commonly asked questions; these messages can be easily inserted into email replies.

Also, messages within the Library can be categorized for easy look-up. For added convenience, Library messages are automatically organized into a list of Frequently Used Responses for each user. Standard responses help ensure that a consistent and accurate message is present to every customer.

Benefits. Enhanced accuracy, speed and consistency of email responses.

Ensuring prompt and professional email correspondence between a company and its customers

Situation. Your customer is dealing with an increasing volume of email correspondence. While their employees claim to be keeping up, your customer is receiving complaints due to unsatisfactory or erratic responses.

Solution. VisNetic MailFlow allows contacts to be managed in a logical implementation and provides the means for accurate and timely responses, increasing overall customer satisfaction. In addition to the Standard Response Library, VisNetic MailFlow effectively streamlines mail management with other useful functions.

In VisNetic MailFlow, each agent is responsible for monitoring one or more ticket boxes. Agents may respond to messages directly or forward the message to other agents for collaboration. If they cannot resolve an issue, then the related ticket can be escalated to a supervisor.

The agent's view of the ticket box is customizable. Ticket boxes can be sorted using a combination of flexible sorting criteria. Colors can be used to represent higher priority information or, tickets that have been in the queue for longer than a predetermined threshold. A ticket box can be set to forward all tickets or just new tickets to another ticket box. This is meant to handle situations where an agent becomes unavailable for a period of time.

Benefits. Fostered customer relationships.

Simplifying Email Client Administration

Situation. Your customer, the IT Manager, has no means of centralized email administration and must spend valuable time constantly configuring email clients at each employee's workstation.

Solution. VisNetic MailFlow allows agents to manage support requests from any geographical location with a browser (i.e. Internet Explorer 5.5+) and an Internet connection. Administrators can remotely configure routing rules, manage users and groups, view system logs and more.

Routing rules facilitate the sorting, prioritization, and automatic processing of inbound email messages. Rules can be configured to match "to" and "from" email addresses, or text in the message subject and/or body. Using routing rules,

administrators can create auto-reply emails, set ticket box destinations, move to the administrative trashcan or delete the message permanently.

The administrator can create, modify and remove agents and groups from the administration interface. Agents can be either local (with authentication information stored in the MailFlow database) or authenticated against a Windows NT domain.

When users delete objects, they go to an administrative trashcan. The administrator can review the deleted messages before removing them. To facilitate this task, the trashcan view can be filtered based upon agent or object type.

The administrator can also archive or purge old messages. Archiving moves the message body and attachments into a zip file in a specified directory. Information about the archived messages is retained in the database. Both purging and archiving can be run periodically as a scheduled task.

Benefits. Efficient, centralized email administration.

Attempting resource planning to optimize business operations

Situation. Customer feedback and common product complaints are disappearing into a void and management is working without critical information.

Solution. VisNetic MailFlow's flexible reporting tools help ensure that what's learned about customers and products is retained and communicated within the organization. Reporting features include custom reports which can be sent to the screen or downloaded as a CSV file. These critical management tools address issues such as planning around peak periods, improving productivity and implementing customer feedback.

Benefits. Reduced support costs and informed view of customer relationships, through increased business intelligence.

Overview of Key Features:

Secure and Efficient Message Handling

- POP3 message collection with APOP support
- Robust, outbound SMTP messaging with automatic retry, connection concurrency, and optional SMTP AUTH
- Comprehensive outbound and inbound message and attachment virus scanning support (with plug-in)
- Complete MIME attachment support, with decoding support for quoted-printable, base64, BinHex, MacMIME, and UUencode.

Adaptable Routing Rules

- To and From address matching
- Message subject and body text matching

- Automatic message processing (auto-reply, auto-forward)
- Flexible mail routing options (agent and ticket box assignment, ticket prioritization, delete to administrative trashcan)

Secure User Access Rights

- Windows NT security integration
- Ability for users to belong to multiple groups
- Access control list to grant rights to specific user/groups
- System-level privileges

Customizable Tickets

- Ticket history view (includes all messages, comments, actions)
- Forward messages to other agents for collaboration
- Escalate tickets to a designated Supervisor for assistance

Flexible Agent Interface

- Web-based (supports MSIE 5.5 and above)
- Supports SSL web server, for enhanced security
- Printer-friendly screens, including "print preview"
- Search capabilities, based on contact, date, subject or ticket box

Convenient Standard Response Library

- Lists of answers to commonly asked questions, with attachment support
- Access control list allows customized access rights
- Automatically generated list of most frequently use standard responses
- Customizable 'My Favorites' allows agents to manually create shortcuts to their favorite Standard Responses

Professional Composition Tools

- Integrated spell checking, with preview
- Signature selection option (or no signature)
- Custom headers and footers
- Ticket notes (for internal comments not exposed to customer)
- HTML message editing capability

Flexible Reporting Tools

- Filtering by group, agent or ad hoc criteria on all reports
- Ability to export reports to an external data file (CSV)
- Ability to create custom reports

Assorted Report Types

- Number of unanswered items by ticket box
- Maximum item age by ticket box
- Average item age by ticket box
- Incoming messages per ticket box over time
- Outgoing messages per agent over time

- Outgoing messages utilizing standard response (as % of total)
- Outgoing message character/word count (non standard response)
- Average number of messages taken to resolve a ticket
- Complete history for a ticket box or agent

Web-Based Administration

- Archive (move messages older than a specified interval and up to a maximum archive size to a secondary folder)
- Scheduled purge (delete messages older than specified interval and not associated with an open ticket permanently)
- Empty waste basket
- Configuration of routing rules
- Configuration of logging and log viewer
- Create, edit and delete agents or groups
- Configuration of administrative alerts
- AntiVirus configuration
- Ticket Box administration
- Message collection and delivery
- Access Control

Overcoming Objections

Why should I buy an Email Management solution?

VisNetic MailStream is an excellent investment for organizations with contact centers and/or customer service departments responsible for responding to email requests. Email management and routing offers the ability for an organization to centrally manage, control and safeguard its electronic communication with customers. This results in improved productivity, efficiency, and flexibility.

Why should I buy VisNetic MailFlow and not another email management solution?

VisNetic MailFlow is an economical solution for organizations who are experiencing increased volumes of email from customers and can no longer rely on a standard email client. On the other hand, they cannot justify the high cost or complication of a complete CRM solution. VisNetic MailFlow is a perfect fit.

I have a contact management solution and it works fine. Why should I use VisNetic MailFlow?

Contact management solutions can be an effective tool for sales associates. However, they do not lend well to customer service operations because such solutions lack email management tools. VisNetic MailFlow facilitates continuity and efficiency of dialog, as well as enforcement mechanisms for appropriate response times.

Will my current set up work with VisNetic MailFlow?

All you need to deploy VisNetic MailFlow is a database server, a Windows server-based operating system (i.e. Windows Pro, Server or Windows XP Professional), an ISAPI compatible web server (such as Deerfield.com's VisNetic WebSite or MS IIS), and a mail server (like VisNetic MailServer from Deerfield.com).

COMPETITIVE PRODUCT SUMMARY

There are several approaches to email management. VisNetic MailFlow offers the following advantages over the alternatives.

- Improves email productivity and efficiency when compared to a standard email client or contact management solution
- Less costly or complicated than a full-fledged customer relationship management [CRM] solution

TECHNICAL SPECIFICATIONS

Required Software

VisNetic MailFlow has been certified in the following environments:

- ❑ Web Servers: compatible servers are VisNetic WebSite from Deerfield.com or MS IIS 5.0 and up
- ❑ Database Servers: SQL Server 7.0 and above, and MSDE
- ❑ Operating Systems: Windows 2000 Server and Pro, Windows XP Professional
- ❑ Web Browsers: MS IE 5.5 and above

Additional environments will be added as they are certified by our Software Quality Assurance and Development teams.

Other Specifications

VisNetic MailFlow requires access to a mail server, either locally or hosted by your Internet Service Provider. Using VisNetic MailServer from Deerfield.com will result in maximum compatibility. However, VisNetic MailFlow will also work well with POP3 compatible mail servers such as Microsoft Exchange.

Documentation

Documentation for VisNetic MailFlow includes the following:

- ❑ Installation instructions
- ❑ Release Notes
- ❑ User Guide
- ❑ Administrator's Guide, including Implementation Guide

Ordering Information

VisNetic MailFlow is available via electronic software delivery (ESD) with a fully functioning 30-day evaluation period prior to registration. Licenses may be purchased based on the number of seats required.

Providing Complete Solutions

Mail Server. VisNetic MailServer is a multithreaded, multiprocessor capable mail server that supports the most widely used mail protocols, including SMTP, POP3, IMAP4, HTTP, and LDAP; each of these protocols can be secured utilizing SSL/TLS. Its robust architecture can accommodate virtually unlimited domains and accounts. VisNetic MailServer Pro purchases include a VisNetic MailFlow 3-user license.

Antivirus Plug-in. Installed at the mail server (i.e. on VisNetic MailServer), rather than dispersed on each client computer like typical antivirus solutions, VisNetic AntiVirus Plug-in is a superior antivirus solution that will effectively secure the network mail flow at the email gateway.

Web Server. VisNetic WebSite was the first web server developed for the Windows Operation System and continues to be on of the most intuitive and flexible web server available today. Deerfield.com continues WebSite's heritage of meeting the needs of novices and webmasters alike.

FROM DEERFIELD.COM

Deerfield.com is an Internet Software and Solutions provider based in Northern Lower Michigan. The company was formed, and continues to operate, as a privately held company, with collective experience in the computer industry as consultants, marketers, distributors, networking engineers, and technicians.

At Deerfield.com we are our own customer, especially when dealing with business development opportunities. This produces a distinct advantage in truly relating to

customers. Growing a business in rural Northern Michigan often presents obstacles, each requiring a specialized solution. Because of this, Deerfield.com holds the values of our customers and their needs close to heart when expanding its product suite. We continually learn, through personal experience and open communication with customers, that a solution must:

- Be just that - the resolution to a problem
- Offer easy installation, configuration and administration
- Provide cost effectiveness upfront and future financial benefits
- Through download, be readily available and include ample evaluation of all features

The vision for VisNetic MailFlow stemmed from Deerfield's *commitment to its own customers* for high service standards and quality control; the result is a product centered around a common sense approach, which capitalizes on sound business practices rather than hype.

Want to learn more?

To learn more about VisNetic MailFlow or other software solutions from Deerfield.com, please logon with your Reseller ID and password at <http://www.deerfield.com/corporate/resellers>. Or, contact a Channel Sales Representative at +1 (989) 732-8856 who will be happy to assist you. To arrange an onsite visit at Deerfield.com, please ask for Jennifer Buhr, Channel Sales Manager.