

# FrontRange GoldMine Enterprise Edition

## Executive Overview White Paper

February 2007

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 Windows Vista  
Premier Launch Partner

**Microsoft**  
**GOLD CERTIFIED**  
Partner

## Welcome

Thank you for your interest in the FrontRange Solutions® GoldMine® Enterprise Edition solution. For over 15 years, FrontRange has been a market leader in providing Customer Relationship Management solutions to small and medium-sized enterprise and distributed enterprise customers. Throughout our history, our CRM and service management solutions have been used by more than 130,000 companies and over 1.7 million users worldwide.

FrontRange designed GoldMine solutions to deliver maximum business value and the lowest total cost of ownership. By aligning the business goals of companies with their service delivery priorities, we have helped some of the most successful companies in the world achieve bottom-line results. By empowering service or support organizations to create, track, manage and view every aspect of service delivery, FrontRange is transforming organizations from reactive to proactive and bringing industry-proven best practices to companies of all sizes.

If you are committed to improving your sales, marketing and customer service capabilities, this detailed document will explain how GoldMine® Enterprise Edition from FrontRange Solutions® can help you achieve that goal. If you have questions or require additional information or other support to move your project forward, please contact us at 800.776.7889.

We look forward to demonstrating our own commitment to serving you.

Sincerely,



Kevin J. Smith, Vice President, Products  
FrontRange Solutions



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## FrontRange Introduction

FrontRange Solutions® develops award-winning software and solutions used by more than 130,000 companies and over 1.7 million users worldwide to manage a wide variety of business relationships and provide exceptional service. The FrontRange Solution Families, designed specifically for small to medium-sized enterprise and distributed enterprise organizations, include:

**IT Service Management**, which includes the popular HEAT solution, delivers enterprise-class ITIL® out of the box, giving customers increased productivity, and the ability to provide personalized customer service and improved customer satisfaction.

**Communication Management** allows growing and distributed enterprises to optimize the customer experience while enhancing your business productivity by combining state-of-the-art communications technologies with FrontRange Solutions award winning GoldMine, HEAT, and ITSM solutions.

**Customer Relationship Management**, which includes GoldMine® Enterprise Edition (GMEE), offers a configurable, extendable and interoperable solution. GMEE provides a holistic view of their customers to help increase employee productivity, drive revenue, and provide better insight to make real-time business decisions.

Our solutions have allowed us to help customers in over 50 countries around the world automate sales and marketing activities, drive revenue and reduce cost. Our products help clients increase customer satisfaction, which leads to greater customer loyalty and better retention of customers. Our solutions deliver powerful, “out of the box” functionality with limitless configuration options necessary to support the unique ways in which our customers do business, all with some of the lowest total cost of ownership metrics in the industry.

Building on the unequaled success of our award winning GoldMine® product line, our new GoldMine® Enterprise Edition combines industry best practices with the experience gained from over 15 years of helping our worldwide customers improve the way they sell, market and service their clients. The resulting solution represents a feature-rich set of sales, marketing and customer service modules built on a common platform that helps to reduce overall costs while maximizing their return on investment. The solution helps transform an organization from being reactive, to becoming proactive.

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## Worldwide Presence, Local Support

Based in Dublin, California, FrontRange Solutions® is an international software company with offices in Australia, China, France, Germany, Italy, Singapore, South Africa, the United Kingdom and multiple U.S. locations. Our GoldMine® and HEAT products are used by more than 40 percent of the FORTUNE 500® and 76 percent of the FTSE 100, with customers ranging from small businesses to market-leading companies, including, Coca-Cola, Mack Trucks, Prudential Securities, Shell Oil, and Turner News Network.

To support our exceptional customers around the world, FrontRange has built one of the most complete product ecosystems in the world. FrontRange customers and partners can be found in over 50 countries, and our products are localized in 10 different languages. FrontRange maintains strategic alliances with software companies that shape the future of technology and enable us to deliver solutions that work seamlessly with many of the products you already use.

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## Company Strategy

FrontRange Solutions® is committed to delivering powerful yet flexible solutions designed specifically to overcome the business challenges faced by our customers. These products enable them to achieve the customer focus, productivity and optimization that support extraordinary business relationships. Because FrontRange delivers business solutions based on industry best practices, our customers benefit from proven solutions that can be deployed quickly to produce real return on investment and are flexible enough to configure in order to match their business needs.

We also recognize that any software solution, no matter how well it is designed, is only as good as the people using it. To address this issue, we have developed world-class support, education and professional services offerings that ensure success regardless of a company's size or objectives. It is this holistic approach to the needs of our customers that drives our company and continues to guide us into the future.



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## Technology Vision

The FrontRange Solutions technology vision is straightforward: provide powerful, ready-to-deploy solutions that can be extended to meet the exact needs of our dynamic customers. To accomplish this, FrontRange has developed a leading-edge architecture, which allows organizations to leverage a common database, reporting engine, business process automation engine, security model and configuration tools. The architecture helps simplify application administration while being one of the lowest total costs of ownership in the industry. The FrontRange Foundation provides tangible benefits to organizations and represents a significant point of differentiation in our market by providing a platform that is:

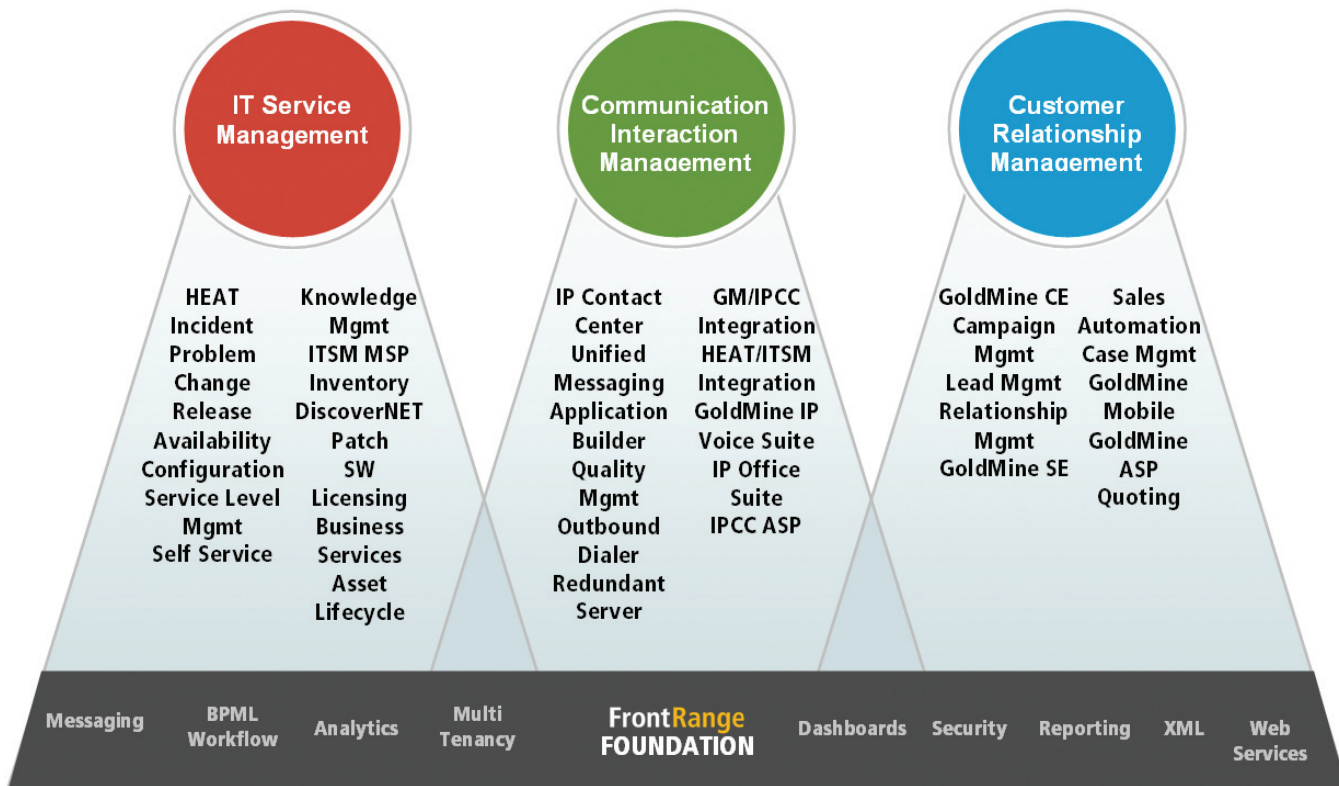
- A common architecture that supports all FrontRange applications
- Flexible enough to be configured and supported by nontechnical experts and powerful enough to satisfy the most demanding enterprises
- Designed to integrate with third-party applications and existing data
- Built completely on the Microsoft® .NET product architecture
- Built on industry standards to ensure compatibility and flexibility
- Designed to be secure, scalable and extendable

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## One Common Platform

As business and IT environments become increasingly complex, managers are faced with the challenge of integrating multiple data sources or applications to extract meaningful information about the effectiveness of their IT services. Solving this challenge requires an investment in a technology platform that can integrate information across all users and functional roles of the service desk as well as with legacy and third-party data sources to create a complete 360-degree view of the IT organization. Previously, this would have required expensive, time-consuming services and custom software development, presenting a return on investment model that was hardly attractive to any executive.

With the launch of GoldMine Enterprise Edition in 2006, FrontRange delivered a next-generation technology platform designed to help companies realize the vision of a totally integrated application platform for them to solve business issues. The FrontRange Foundation architecture is the result of five years of product design and refinement. The Foundation provides companies with a complete technology foundation that simplifies and standardizes software tools and interfaces which guide their organizations. Built on a service oriented architecture, the FrontRange Foundation allows customers to receive maximum value through ease of integration, configuration options, simplified deployment and access from any location.



FrontRange offers a rich portfolio of applications that leverage this Foundation layer to provide preintegrated solutions for IT Service Management; Customer Relationship Management, and Communication Interaction Management. The unrivaled depth in our solution suite, plus our ability to integrate with virtually any existing enterprise system, gives you the ability to create a fully articulated relationship management system capable of tracking virtually every interaction with all your internal and external customers.



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## GoldMine Enterprise Edition Overview

Managing your business can best be described as both an art and a science. Without real-time information and meaningful data, decisions are made based on suppositions and observations rather than empirical data. Business processes and documentation systems often evolve over time and out of necessity and center primarily around manual processes. Even when technology is involved, it is often very complex and typically requires so much modification that an organization may only realize very small benefits from its substantial investment.

GoldMine® Enterprise Edition from FrontRange Solutions is a modular, comprehensive, Customer Relationship Management solution that allows organizations to automate and improve the effectiveness of sales, marketing and customer service operations simply and quickly. It incorporates industry best practices giving organizations the ability to use built-in work flow and best practices, or allows them to incorporate their own best practices and business process flows. Bottom line: organizations can realize tremendous savings by avoiding costly business process reengineering projects.

GoldMine® Enterprise Edition has been created specifically for organizations that require a highly configurable yet cost-effective solution that can deliver immediate and lasting return on investment. Its modules include:

- Relationship Management
- Sales Management
- Quoting
- Marketing Automation
- Customer Support

## Relationship Management

Designed to work the way you work with your customers, GMEE's Relationship Management module not only includes Account and Contact Centric relationships, but also allows you to define your own relationships so your users can be more productive and get the information they need to make real-time business decisions. And because the technology adapts to your business and process, users need less training and have much higher adoption rates.

Relationship Management includes tight integration with Microsoft® Outlook® calendaring and email capabilities. Users have the ability to schedule appointments, activities, and tasks or send email in Outlook and have them attached directly to Accounts, Contacts, Opportunities or any other business object.

## Sales Management

Close more sales by creating and distributing an extensible Sales Methodology for one consistent sales business processes. GoldMine® Enterprise Edition allows managers to automatically assign Opportunities via territories, products or an extensible business rule. Sales agents can actively work on their pipeline, either individually or with the help of their sales team, from instantiation, through all the sales methodology stages, and to the eventual close of sale. Follow a methodology, in which the application can help guide users to schedule follow-up tasks, track customer interactions, or suggest information to help the close of sale. Refine your sales process through sales analytics that show you what factors lead to won and lost sales.

GoldMine® Enterprise Edition provides sales managers a comprehensive tool to manage their subordinates' forecast. Upon forecast submission, sales managers can ensure accuracy and reliability by following the companies best forecast business process, either out of the box, or via extensible business rules. Forecast management enables sales organization of any size to clearly examine the health of their business in real time in order to increase revenue and decrease costs.

## Quoting

The Quote management module is integrated within the GoldMine® sales business process. The system allows users to create manual quotes, or quotes can be automatically generated from the information previously captured in an opportunity, thus helping maintain consistency on customer information, products and pricing. A flexible approval process ensures that each quote is consistent and contains the correct pricing and product sets. GoldMine® Enterprise Edition helps quotes be delivered faster and without mistakes so customers can receive their orders on time and with as little human interaction as necessary.



## Marketing Automation

GoldMine Enterprise Edition's Marketing Automation module comprises of two modules: Campaign Management and Lead Management.

The **Campaign Management** module allows you to track activities, costs, and tasks (including the individual responsible for specific tasks) for each campaign and create test campaigns before launching full-scale ones. Many organizations have very long cycles and often wait to see revenue fluctuations before realizing that the campaign may need to change in order to optimize revenue potentials. Using Quick Ratio, organizations can immediately monitor the affect a campaign is having on the pipeline and by leveraging the marketing features, have the opportunity to quickly make adjustments to the campaign by changing the message, audience, or offer for greater effect and a bigger increase in potential revenue.

The **Lead Management** module allows you to set up either manual lead routing (where each lead is manually assigned to a person/group) or automated lead routing (where leads are automatically routed according to business rules). GMEE also makes it easier for sales and marketing to communicate with each other. For example, a sales person can reject a lead and add comments explaining the reason for immediate feedback. Consequently, the lead can then be reassigned and/or the marketing department can refine their marketing efforts. In addition, Dashboards can be used to monitor leads that have no activities assigned or have not been accepted and real-time reporting provides another lead monitoring tool for sales and marketing.

## Customer Service

GoldMine® Enterprise Edition helps companies increase their level of customer support with a variety of useful features. Enhance productivity by streamlining support best practices and through accessing a knowledge base full of information using the customer support module. Allow customer service agents to improve customer satisfaction and decrease costs by providing real-time, consistent answers to their customer base through a variety of access points, including e-Mail, telephone and web access, and by giving them access into the complete customer case history. The customer support module is a perfect fit to help round out the customer relationship management capabilities of GoldMine® Enterprise Edition.

## Interaction Management

With GoldMine Enterprise you can also add interaction management capabilities including Screen pops, click to dial, intelligent routing and much more to increase staff productivity and maximize each interaction with your customers and prospects.

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## Sources of Customer Value

Primary value achieved from the GoldMine Enterprise solution is delivered in four key areas:

1. Improved customer service leading to customer loyalty
2. Cost savings and cost avoidance
3. Increased Revenue
4. Better management oversight

### Improved Customer Service leading to Customer Loyalty

**GoldMine® Enterprise Edition is integrated with interaction management capabilities that leverage the latest technology** - Now, any size firm can afford advanced capabilities. Interaction Management pulls together all disparate pieces in order to create a winning solution allowing firms to be more responsive to their customers' needs, capturing more new customers, building customer loyalty and deriving increased revenue from existing customers, all while driving down the costs.

**All customer data, contact data and prospect data is stored in the same place** - Your marketing, sales and service organizations will access the same customer data during their day to day activities. This helps you connect and automate your business across divisions, and allows all users to access the same customer data, thus sending one, clear message when interacting with customers.

**Data cleansing tools** – GoldMine® Enterprise Edition provides robust data cleansing tools to clean up existing data, or limit the possibility of new data corruption. A complete set of dashboards and reports are also available to mine your important customer information. Analytics tools allow you to decipher top customers and contacts to spend quality time on.

Customer loyalty is no mystery. When customers can conduct business as they wish, when they wish, they keep coming back. And understanding customer preferences – not just what they like to buy, but how they like to buy it and how they like to communicate with you – enables you to lower operating costs while raising service levels, deepening loyalty as you cross-sell and up-sell.

With FrontRange Interaction Management solutions, information flows freely and continually between your business and its customers.



## Cost Savings and Cost Avoidance

For many companies cost reduction and cost avoidance are the primary drivers when justifying and moving forward with a CRM solution.

**Easy to install, configure and manage** - Unlike other solutions that have very costly implementations, the GoldMine® Enterprise Edition solution is easy to implement and configure. With the Administrator tool, you can manage the system at every level. Whether adding or modifying a field, adding or modifying forms and views, or defining your own relationships, all is done without writing a single line of code.

**Configuration at all levels enables quicker adoption and lower training costs** - Because you are able to use your own terminology, define your own views to your business, and support your customer business process, you have lower training costs and higher, quicker adoption rates.

**Easy response to changing business environment** - Today, business is moving “at the speed of internet.” Companies are introducing new products and processes to maintain their competitive advantage, requiring a solution that has the same business agility to support business objectives. Using the flexibility of GMEE to configure fields and forms, you can typically make needed changes with no programming.

**Simplified integration with existing tools and legacy systems** - GoldMine® Enterprise Edition was developed with your integration needs in mind. Because GMEE supports multiple integration approaches, you are able to integrate much easier and with lower cost. For example, using the Administrator tool, point to the database and select the fields that you wish to display in GMEE. No coding required.

**Powerful business process engine automates redundant as well as complex tasks and processes** - GMEE Business Process engine uses BPML (Business Process Modeling (or Markup Language), an industry standard. By using GMEE, not only can you support standard business processes across your sales, marketing and support divisions, but you can also have it across any applications in your organization that consumes BPML, regardless of vendor.

**Single Platform** - Additional cost savings are gained from reducing the number of application platforms and technology standards in use by your sales, marketing and customer support organizations. The FrontRange Foundation provides a common integration platform, reporting tools, business process engine and security subsystem to allow companies to consolidate their myriad of proprietary platforms and vendor products onto an open standards-based platform for easy management and integration.

## Increased Revenue

**Identifies your most profitable customers** - GMEE helps you drive additional revenue by identifying your most profitable customers. With the “cradle to grave approach,” you can track the costs of acquiring and supporting a customer and then compare it to the revenue obtained from that customer. Once you determine who your most valuable customers are, you can ensure you are spending your resources wisely. In addition, you can use that information to segment your marketing efforts and focus on similar prospects in order to drive revenue and profitability

**Improves efficiency** – We all know if your sales teams are not talking to customers and prospects, they can't be selling. By leveraging the Business Process Engine GMEE not only allows you to automate redundant tasks, but also any complex business process. This flexibility allows your staff to focus on what they do best.... Sell.

In addition, because GMEE has multiple methods to integrate to other systems, now you can provide the information your staff needs to handle routine calls quickly, and then turn every contact into a sales opportunity.

**Shortens sales cycle** - Use GoldMine® Enterprise Edition to collect complete customer and prospect information into a single system. Now, marketing automation can leverage this single source of true customer information to help shorten your sales cycle by targeting the right customers, at the right time.

**Provides consistent follow-up** – By using automated alerts and messaging you are able to send one clear, consistent message throughout your customer base. Customers can use automated alerts to help reduce the risks of losing an opportunity due to lack of follow-up or lack of understanding.

**Single point of entry to access all information** - With GMEE's simple integration you can now provide your sales team with a “portal” containing all information from any system within your enterprise. GoldMine® Enterprise Editions integration approach helps save time and money by having all important information in one view so users don't have to learn complicated and unintuitive back office systems.



## Better Management Oversight

In today's competitive environment, companies are demanding better visibility throughout the entire organization. They want assurance, with some level of confidence, that the Sales Organization will achieve their revenue goal and that the Marketing Department is maximizing their ROI.

**Real time Dashboards by roles presents you with actionable information** - Dashboards provide managers real-time visibility into the specific information they need to manage their organization effectively and achieve the desired results. With GMEE you can configure Dashboards by role or even by individual so they have insight to manage their business. If managers need additional Dashboard parts they don't have to wait for the vendor, sales managers or business administrators can create specific dashboard parts, or entirely new dashboards, that can be leveraged within their organization.

**Greater predictability and reliability in your forecasting** - Utilizing customer sales data, sales agent feedback, and lead tracking results from a single system, helps customers forecast future campaign results with great accuracy.

**Greater visibility in sales pipeline** - Because you can get a quick view of campaign responses and potential sales, you have greater visibility into the sales pipeline and a better chance to react to market changes.

**Optimize Marketing ROI** - By tracking marketing activities, costs, tasks, and effectiveness for each campaign, you can adjust and test future campaigns to optimize your return on investment.

## Improved Customer Service

Improve customer service by providing positive experiences, better knowledge management and quick turnaround times for your customers across the organization.

Consistent communication – Be proactive with the status on open issues and communicate constantly and consistently, utilizing the benefits of automated e-mail processes.

Better customer interaction with a single source for all customers information and interactions – Collecting all customer information in a single system with enterprise-wide availability will help establish more accurate and consistent customer interactions. GoldMine® Enterprise Edition provides robust data cleansing tools to help clean up existing data, hinder data corruption and support complete history tracking functionality across all objects. Dashboards and reports are also available to mine your important customer service information and can help you decipher which clients you may need to spend quality, support time with.

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## FrontRange: Support after the Sale

With any software product, the software itself is really only one part of the equation. GoldMine Enterprise Edition from FrontRange Solutions is no exception. We understand that providing the highest value also requires world-class customer support, professional services and education.

That is the organization we set out to build from day one. Each of these services teams is highly regarded by our customers, as evidenced by our extraordinary customer renewal rates. The reason is simple: the goal of everyone in FrontRange Solutions Support Services, Professional Services and Education is to ensure that our customers are successful within their own organizations.

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## Customer Care and Technical Support

The mission of the FrontRange Solutions Support team is to serve our customers with the highest quality of care, technical expertise and professional courtesy—and exceed every customer’s expectations.

FrontRange Solutions takes great pride in its outstanding record of service, as indicated by some of the best customer satisfaction and hold time ratios in the industry. FrontRange is strategically structured to offer global support, with the largest service team located in the U.S.

Our support technicians possess a myriad of industry certifications from leading organizations, including Oracle, Microsoft, Business Objects (Crystal Reports), Help Desk Institute, and Pink Elephant (ITIL). This commitment to continuous education and training for our support staff allows FrontRange to maintain the highest level of service and support standards.

Our customers enjoy access to unlimited telephone support during support hours, including 24/7 support for down systems. E-mail support is provided as well as access to a comprehensive support site and knowledge base of common solutions, product manuals, technical documents, white papers, FAQs and the FrontRange Issue Tracking System.

The FrontRange Customer Care team works closely with other internal departments, as well as external support partners and consultants, to make your customer experience exemplary.

In the end, we want to make sure that the deployment and use of GoldMine Enterprise Edition, as well as our other products, are as smooth and hassle free as it can possibly be. That’s what making customers successful in their businesses is all about.



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## Professional Services

We provide services through our own Professional Services organization and through a network of Certified Consulting Partners. The FrontRange Deployment Methodology focuses on rapid, economic and predictable implementations. We can help you get the most out of your solution both in its initial phases and throughout the entire life cycle.

Rather than having a group of generalists, we have taken an approach similar to that of a neurosurgical team, with specific roles and responsibilities that allow our specialists' knowledge to be focused deeply in a particular area. The result is a team whose members are the best of the best at what they do.

FrontRange practice teams work directly with customers as well as with their outside deployment specialists—whatever it takes to make the customer successful. Among the offerings provided by the FrontRange Professional Services organization are:

- **Discovery**—We will look at your current processes, make recommendations and map out the GoldMine® Enterprise Edition solution that best fits your specific needs.
- **Design**—Based on our discovery recommendations, we will develop process and technology changes to help you achieve target metrics. We will also recommend personnel changes that can help you redeploy skill sets where they will be the most effective, or recommend the initiation of training or retraining. In addition, we can also help you design new reports and metrics to improve the efficiency of the organization.
- **Build**—FrontRange will configure and test the GoldMine Enterprise Edition solution that is specific to your organization. This development will be performed using the rapid application development principles of delivering the project in stages. This way the customer is involved throughout the development process and assumptions can be tested against the realities of the business. The result is a better, more targeted application delivered faster and more economically.
- **Implementation**—In this phase we handle deployment, field testing and administrative and user training and create training tools specific to each customer. Whatever is required to bring your new GoldMine Enterprise system online, FrontRange puts it into place.

All of the above services may be purchased individually or as a complete Professional Services offering.

If you are looking for assistance or simply want to leverage our expertise in customer relationship management, the FrontRange Professional Services organization and Certified Consulting Partners provide a very reasonable alternative to internal development.

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## Education Services

Any software package, no matter how sophisticated, is only as good as the people who use it. Deriving the ultimate value from that investment requires training—for the users and the administrators.

FrontRange Education Services provides training and certification throughout your organization to ensure you are taking advantage of all the features, capabilities and configuration options GoldMine Enterprise Edition has to offer.

FrontRange Education Services consists of a team of professional full-time education specialists capable of training large or small groups within your organization. Our diverse team members, with their broad base of instructional backgrounds, have allowed us to create a software curriculum that is unique and engaging and draws on the best practices of a variety of teaching disciplines.

Part of this is realizing that different people have different “best ways” of learning—as well as greatly different schedules. To allow for these differences, FrontRange offers training through a variety of methods, including instructor-led training, live and recorded Web-based training, and self-paced eLearning.

These are not generic programs. Each method is customized to the organization to fit its systems, terminology and corporate culture. Simply stated, the goal of Education Services is to arm each customer with the knowledge to be able to manage processes today and maintain that knowledge for future success.

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## Give Your Employees and Customers an Excellent Experience

In a world where IT capabilities can differentiate companies and create competitive advantages, the ability to provide a superior service desk experience is a top priority for an increasing number of organizations. More and more, companies are being defined by their ability to satisfy the requests of internal and external customers.

GoldMine® Enterprise Edition from FrontRange Solutions is designed to help small, midsize and distributed enterprises maximize the effectiveness of their Sales, Marketing and Service divisions while streamlining the business processes that define them. Our focus is on making the technology an enabler of the organization rather than an end unto itself—exactly what you would expect from a company that is itself defined by its customer service.

At first glance, you have a number of choices for your CRM needs. But if you really want a solution that has been designed from the ground up for businesses of your size, with the flexibility to grow and change as your organization grows and changes, there is really only one choice: GoldMine® Enterprise Edition from FrontRange Solutions.



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