



See and serve your customers **better**SM

Our approach and platform for CRM success

Contents

- What is a CRM strategy?
- Why commit to a CRM strategy?
- What does the CRM technology do?
- What is our preferred CRM platform?
- How might we help?
- How about a demo?



Commitment to knowing and serving your customers better



Customer Relationship
Management

A Commitment

For better interaction with, insight upon, and value for your customers.

A Platform

For collecting data, supporting workflow, providing insight, and connecting outwardly across marketing, sales, and service.

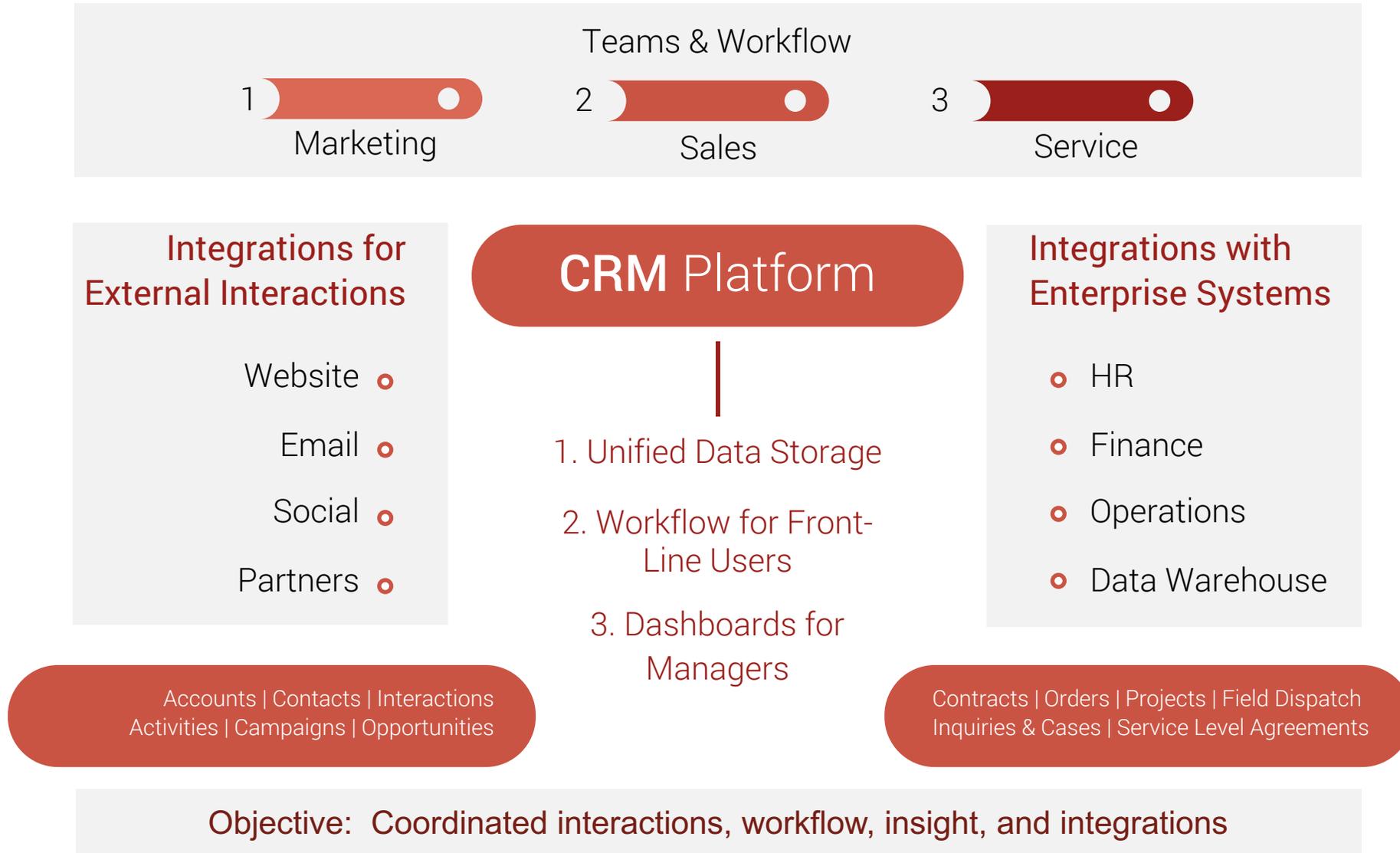
A Culture

Of delivering a positive customer experience via interactions that are informed, timely, and useful.

Value drivers across marketing, sales, and service



Enablement of a CRM strategy, transformation, and culture



Cloud-based, low-code, high-value CRM and BPM

Creatio



CRM

Accelerate sales, marketing and service

BPM

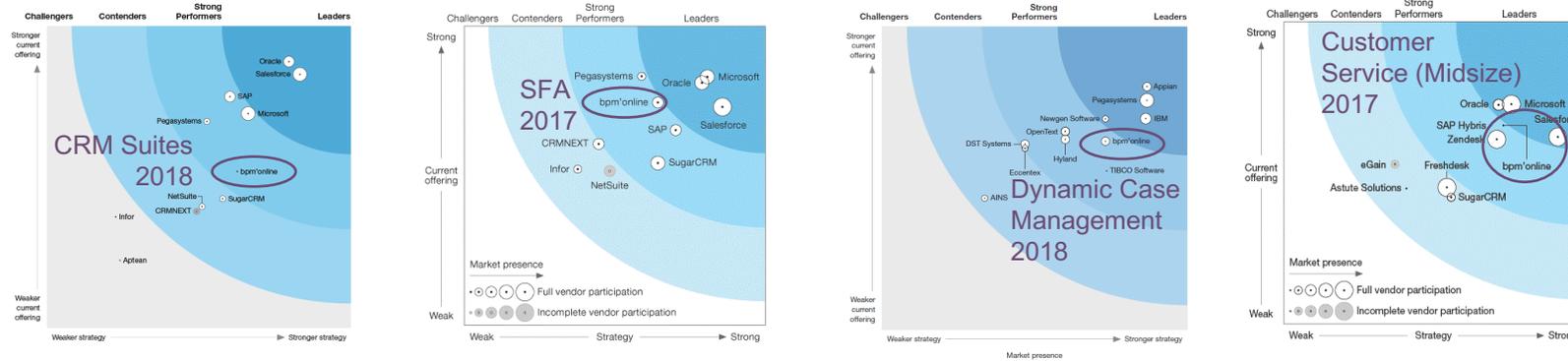
Accelerate operations and maximize agility



Expert-validated functionality

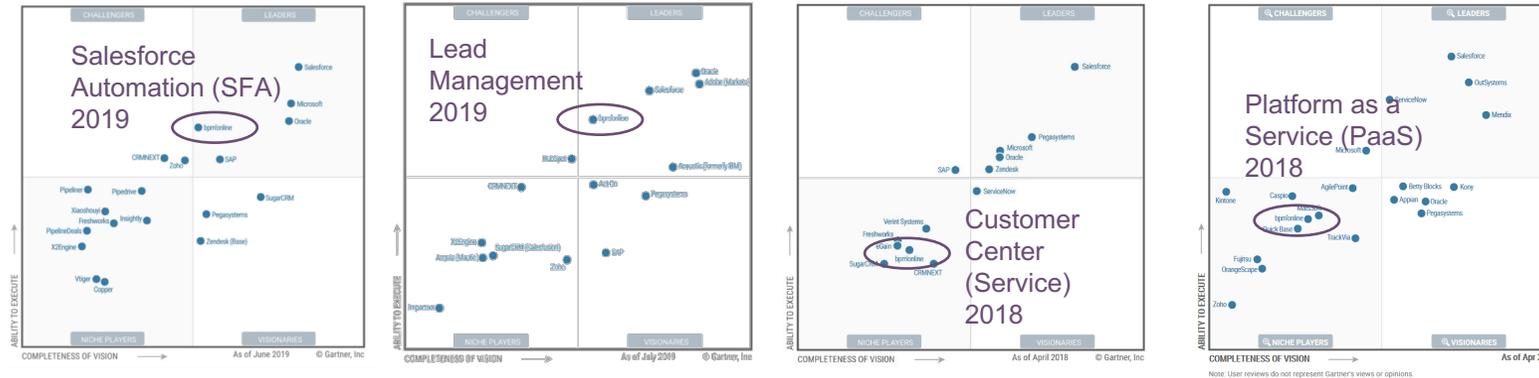
FORRESTER®

Creatio (formerly bpm'online) named a Strong Performer among the leading vendors of solutions for marketing, sales, and service

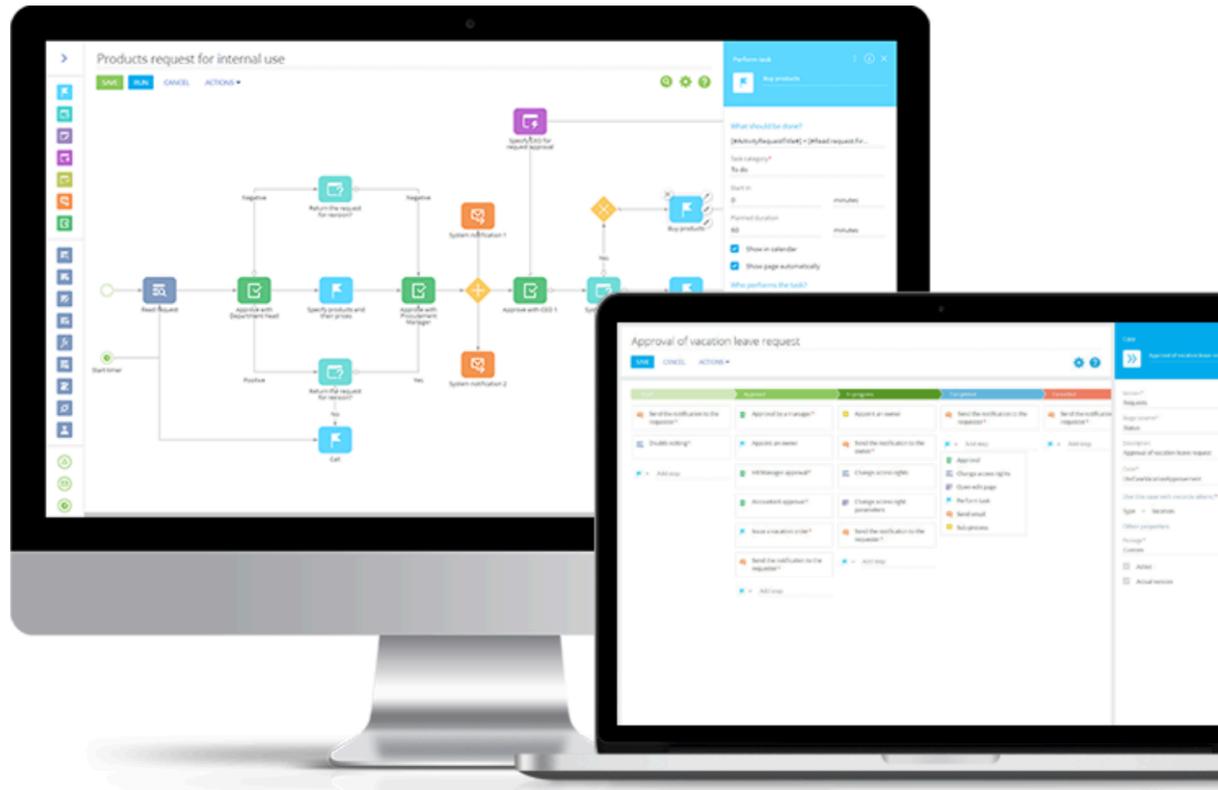


Gartner®

Creatio (formerly bpm'online) included in the Gartner Magic Quadrant for sales, marketing and customer service management, evaluated as a Leader in both marketing and sales in 2019



Automation of business processes of any complexity



Process Designer

...is compliant with the BPMN 2.0 industry standard, allowing for design and support of processes of any complexity.

Visual BPM Designer

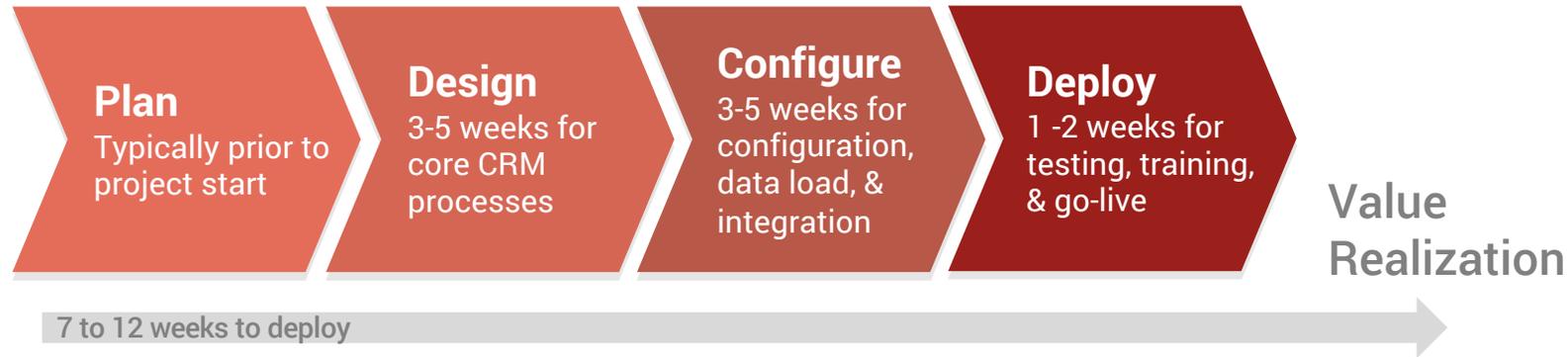
...enables design and automation of structured processes and automatic messages (emails, alerts, etc.).

Dynamic Case Management Tools

...help manage and automate unstructured processes (notably, methods for managing leads, opportunities, and customer requests).

Rapid time to value

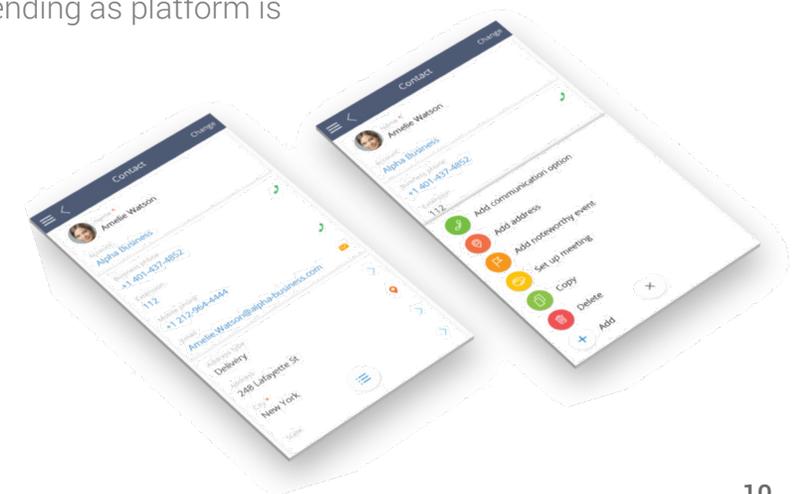
1. Rapid Deployment



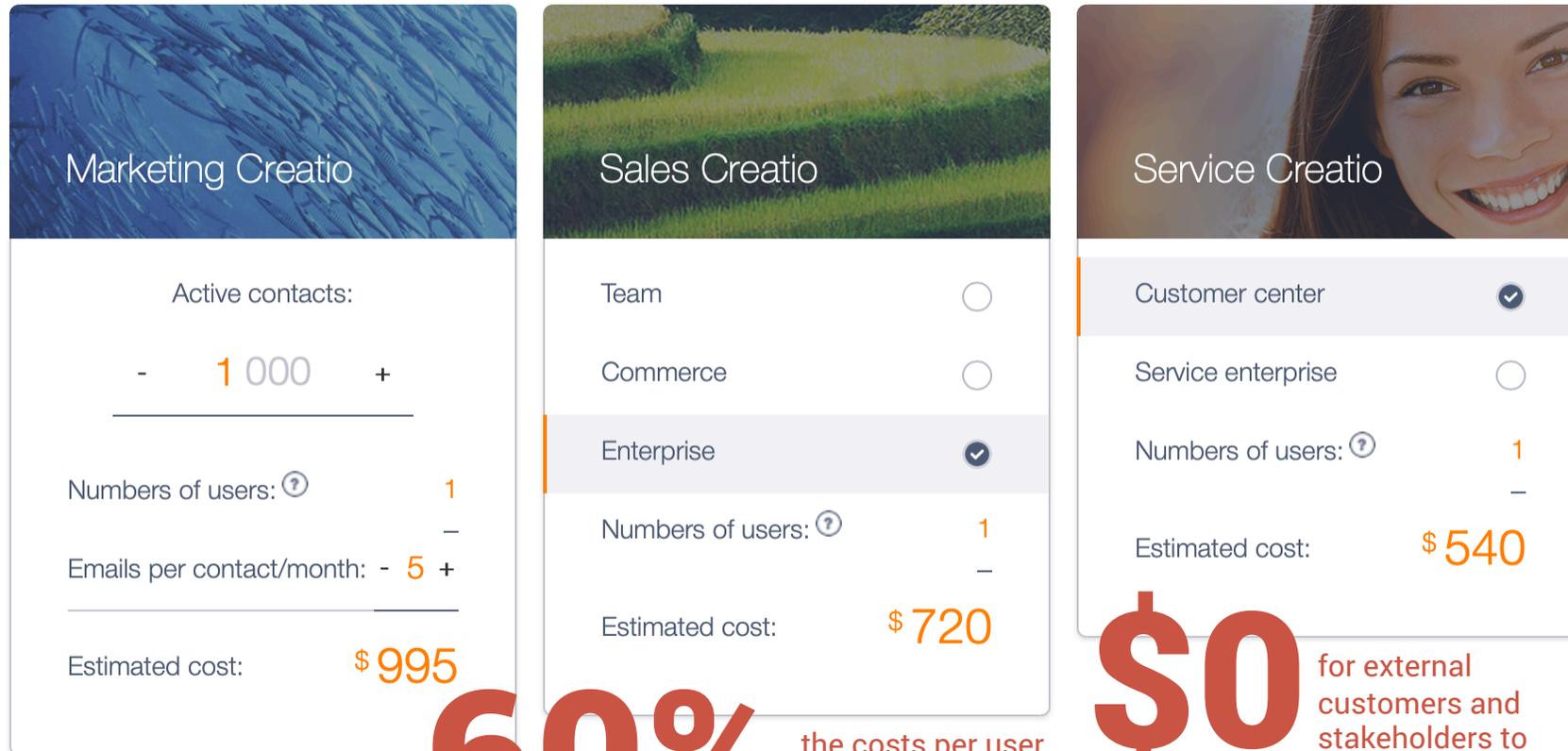
- Pre-planning and pre-configuration by Keen360 accelerates implementation (and reduces costs).
- Main factors that drive extensions of timelines are amounts of customization, data-cleansing, and non-standard integrations that are required.
- Preferred Keen360 approach for CRM is a “crawl, walk, run” strategy for starting, then extending as platform is adopted and value is proven.

2. High Adoption

- Modern user interface (UI): Designed for intuitive adoption and usage. A single “cockpit” for access to the range of customer-related data and interactions.
- Mobile version: Instant access to customer data, calendar, mobile feed, dashboards and analytics.
- Online and offline modes: The mobile app can be used in both online and offline mode. Whichever option you choose, the data you need will always be at your fingertips.



Compelling economics



Module	Configuration	Estimated Cost
Marketing Creatio	Active contacts: 1,000 Numbers of users: 1 Emails per contact/month: 5	\$995
Sales Creatio	Enterprise plan Numbers of users: 1	\$720
Service Creatio	Customer center Numbers of users: 1	\$540

60%

the costs per user per year on "apple to apple" basis compared to the leading cloud-based CRM platforms

\$0

for external customers and stakeholders to track and submit info via the user portal

Notes:

- 1. Minimum annual purchase of \$5,000 per year for an organization
- 2. Pricing calculator is at: <https://www.creatio.com/crm-pricing>

Focus on strategy, operations, and value -- not just technology

1

Strategy Alignment

We are not mere technologists. We align CRM people, processes, and technology with organizational mission and strategy.

2

Leading Methods & Practices

With 35+ years CRM experience for the Keen360 principals, we bring leading methods and practices for sales and service.

3

Workflow Orientation

We focus on the ways that both employees and customers actually work for their jobs, their purchases, and their requests for service or help.

4

Deployment Strategy

We encourage a “crawl, walk, run” approach for adopting CRM strategies and implementing CRM systems. Start slow, then progress.

5

Configuration & Support Strategy

We use a blend of US-based and near-shore professionals for system configuration and support. (Near-shore office is in English-speaking Guyana (S. America).)

Pre-configured, industry-specific versions of Creatio

Pre-configured versions of Creatio, incorporating industry-leading methods gathered and tested with real-world users – with more on the way!

The screenshot shows the KeenSales CRM interface. The main view is for a sales opportunity titled "CRM Re-Platforming". Key metrics include a 45% probability and 130 days in the funnel. The sales process is shown as a sequence of steps: Quality & plan, Commit & Engage, Prove & Propose, Negotiate & Agree, Finalize, and Closed - won. The opportunity details include an amount of 85,000.00, a mood of "Confident", and an owner of "David Lashar". A dropdown menu for "Type" is open, showing options: B2C service sale, B2C solution sale, B2C transactional sale, B2E channel-partner sale, B2E solution change, B2E solution renewal, B2E solution sale, and RFP solution sale. The "B2E solution sale" option is highlighted with a red box.

Pre-Configured Sales Methods

The screenshot shows the KeenLegislative interface. The main view is a list of bills. The table has columns for Bill number, Name, Stage, and Session. The list includes various bills such as "Higher Education - Tuition Rates - Exemptions", "Public Safety - Handgun Permit Review Board - Repeal", and "Natural Resources - Fishery Management Plans - Oysters". The interface also shows a sidebar with navigation options like Organizations, People, Activities, Bills, Votes or polls, Positions, Dashboards, Knowledge base, Sessions, Amendments, Referrals, Milestones, and Ballots.

KeenSales Solution:
Baseline B2C, B2B, and B2G Sales Methods

KeenLegislative Solution: Constituent Services & Legislative Tracking

Validate needs, build confidence, confirm value, seize opportunity

Discovery

Mutual introductions

Friendly Conversation

Let's talk about your business, its ambitions, its needs. We can share our own experience and ideas. Together, we can explore the question of what kind of CRM strategy and platform might be right for you.

Education

Review of the Creatio platform

Product Demonstration

Let's take a look at Creatio capabilities using some requirements and scenarios from your own organization. This way, we can build confidence in the ability of the platform to meet your needs.

Confidence

Executive-level analysis & report

Blueprint, Roadmap, & Impact

Let's validate that CRM and Creatio are right for you. We can run a fast-paced engagement to confirm your business vision, then draft a solution architecture and a realization plan, including assessment of the business impact. After which, you will be ready to decide, commit, and launch with confidence in organizational alignment, system adoption, and business value.



Product Introduction: Creatio CRM



Targeting, engaging, and nurturing potential customers

MARKETING Creatio

- 360° customer view
- Intelligent data enrichment
- Segmentation
- Website behavior tracking
- Lead management
- Trigger campaigns
- Personalized email marketing
- Event management

- Business process management
- Productivity tools
- System designer

Managing and converting leads into opportunities into sales

SALES Creatio

- 360° customer view
- Intelligent data enrichment
- Collaboration tools
- Business Process Management
- Lead Management
- Opportunity management
- Orders and invoices
- Field sales management
- Sales forecasting
- Contract management
- Product management
- Document flow automation
- Project management
- Mobile sales
- Knowledge management
- Synchronization and integration
- System designer

Receiving, assessing, and responding to customer requests

SERVICE Creatio

- 360° customer view
- Intelligent data enrichment
- Omnichannel communications
- Contact center
- Business process management
- Request management
- Problem management
- Change management

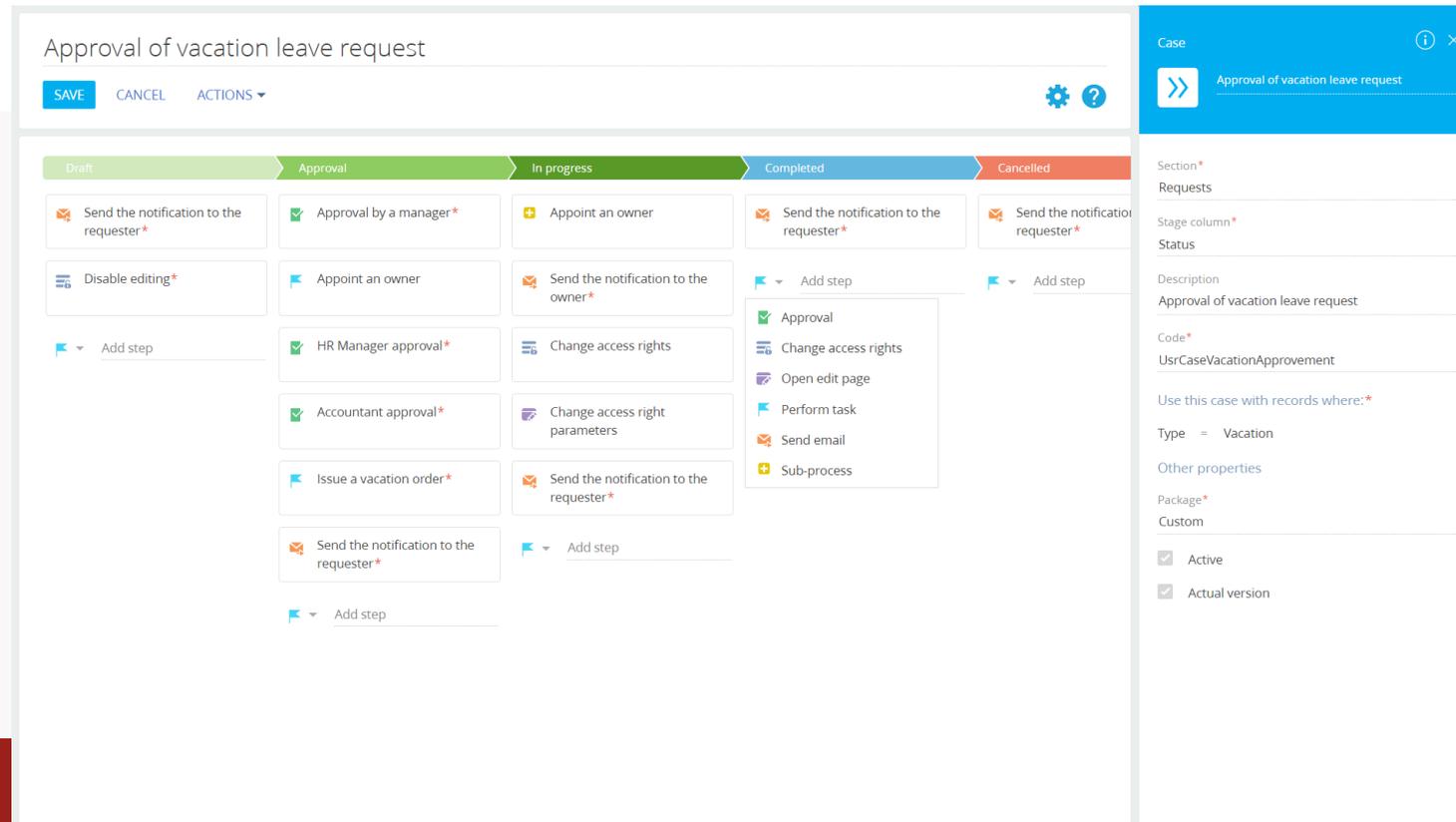
- Release management
- Service catalogue
- Service level management
- Configuration management
- Knowledge management
- Synchronization and integration
- System designer

Business Process Management (BPM)

The screenshot displays a BPM design tool interface. On the left, a sidebar lists 'Process elements' categorized into 'User actions' (Perform task, User dialog, Open edit page, Auto-generated page, Pre-configured page, Send email, Approval) and 'System actions' (Read data, Add data, Modify data, Delete data, Formula, Change access rights, Call web service, Predict data). The main workspace shows a BPMN diagram for a process named 'Presentation'. The diagram includes various elements: start events, tasks (e.g., 'Set process started from another one', 'Save opportunity id', 'Conduct presentation', 'Prepare proposal', 'Set opportunity stage to Proposal submission'), decision diamonds (e.g., 'Opportunity is defined?', 'Opportunity stage was modified by...'), and end events. A right-hand panel provides configuration details for the process, including 'Code*' (Presentation780), 'Version' (0), 'Tag' (OpportunityManagement780), 'Package*' (OpportunityManagement), 'Maximum Number of Repetitions' (100), and 'Process instance caption' ([#[PropertyValue:Caption]#]). It also features a list of checkboxes for process settings: Active, Enable logging, Serialize in DB, and Actual version.

- Collaboration on complex projects
- Document approval
- DCM processes
- Structured BPMN processes
- Process library
- Process monitoring and analytics

Dynamic Case Management (DCM)



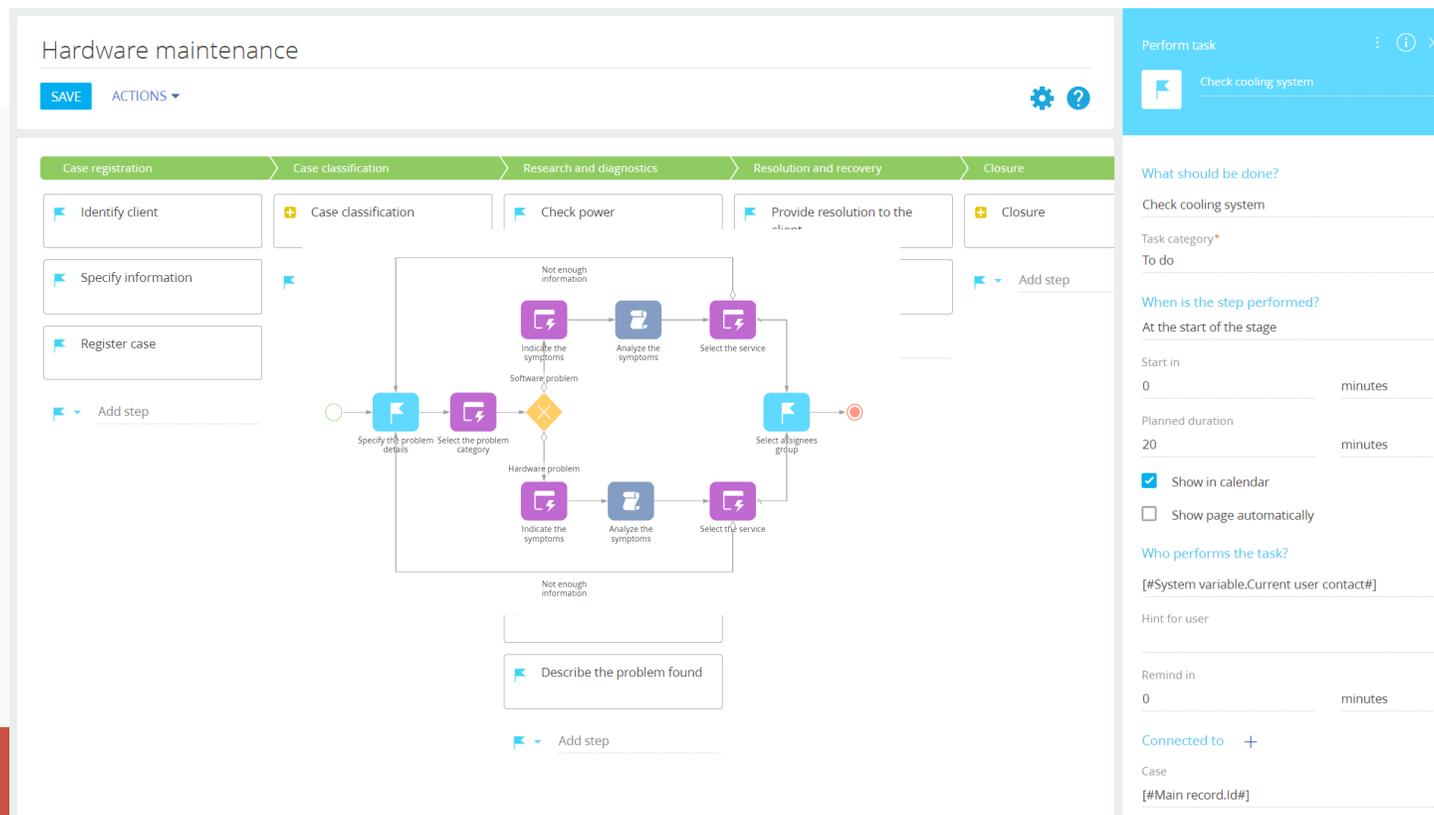
The screenshot displays the DCM interface for a case titled "Approval of vacation leave request". The interface is divided into several sections:

- Case Header:** Shows the case title "Approval of vacation leave request" and a blue header bar with a right arrow icon and the text "Approval of vacation leave request".
- Navigation:** Includes buttons for "SAVE", "CANCEL", and "ACTIONS" (with a dropdown arrow), along with a settings gear icon and a help question mark icon.
- Workflow Stages:** A horizontal bar at the top indicates the current stage: "Draft" (green), "Approval" (green), "In progress" (green), "Completed" (blue), and "Cancelled" (red).
- Task List:** A grid of task cards is displayed, organized by stage. The "Approval" stage includes tasks like "Approval by a manager*", "HR Manager approval*", and "Accountant approval*". The "In progress" stage includes "Appoint an owner" and "Change access rights". The "Completed" stage includes "Send the notification to the requester*" and "Add step".
- Task Menu:** A dropdown menu is open over the "Add step" task in the "Completed" stage, listing actions such as "Approval", "Change access rights", "Open edit page", "Perform task", "Send email", and "Sub-process".
- Case Properties Panel:** A sidebar on the right shows case details: "Section* Requests", "Stage column* Status", "Description Approval of vacation leave request", "Code* UsrCaseVacationApprovalment", "Use this case with records where:* Type = Vacation", "Other properties", "Package* Custom", and checkboxes for "Active" and "Actual version".

- Drag-n-drop tools for case modeling
- Case engine
- Consolidated real-time analytics on case execution

What is an example that combines business processes and dynamic cases?

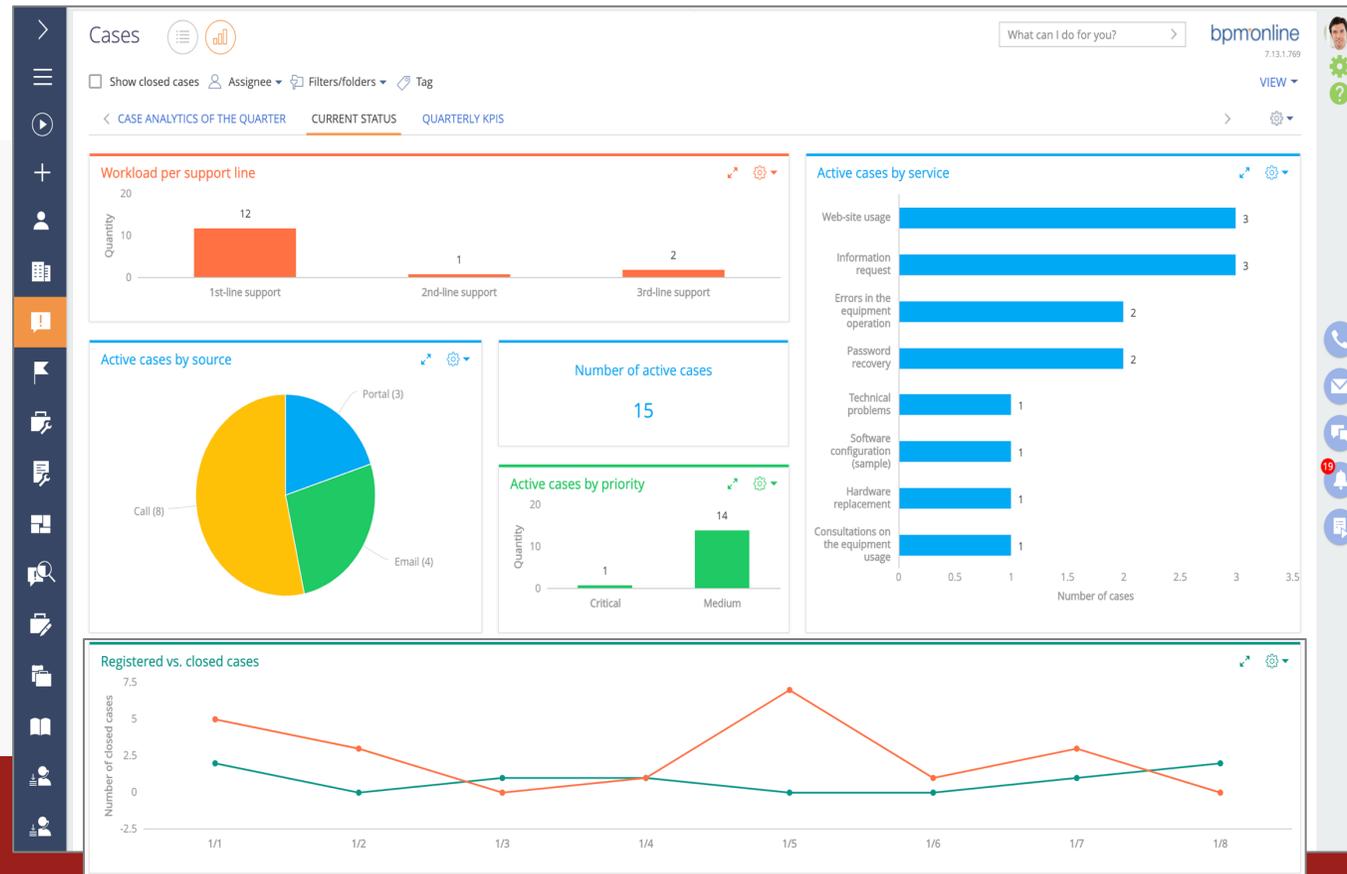
An incident management process



The screenshot displays a software interface for 'Hardware maintenance'. The main area shows a workflow diagram with stages: Case registration, Case classification, Research and diagnostics, Resolution and recovery, and Closure. The workflow includes steps like 'Specify the problem details', 'Indicate the symptoms', 'Analyze the symptoms', and 'Select the service'. A decision diamond separates 'Software problem' and 'Hardware problem' paths. A 'Perform task' panel on the right is configured for 'Check cooling system' with a duration of 20 minutes and a checkbox for 'Show in calendar'.

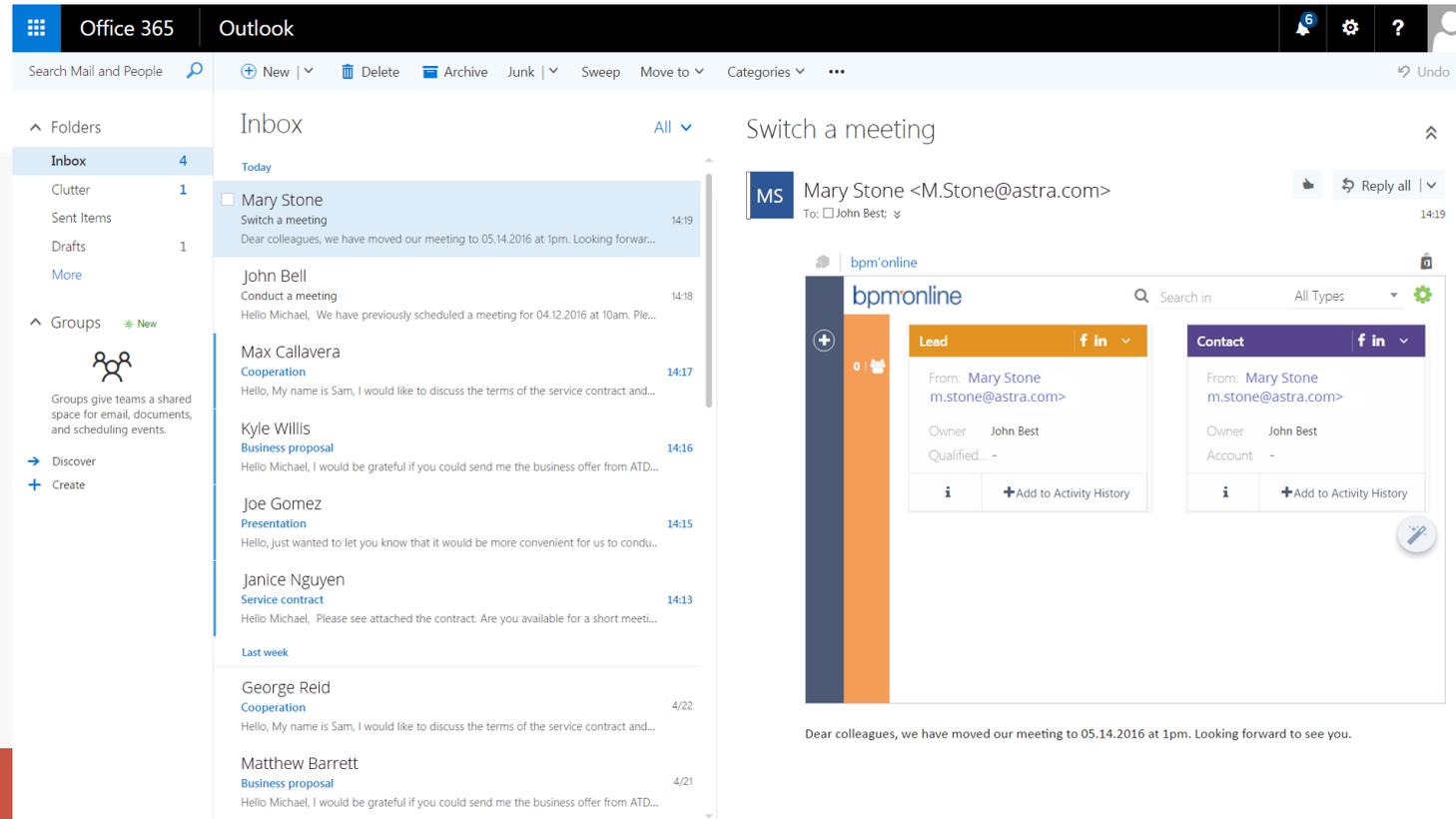
- Automated capture from emails or portal
- Case priority management
- Automated response and resolution time calculation
- Incident investigation, routing, and escalation
- Incident closure with customer feedback

Metrics, reports, and dashboards



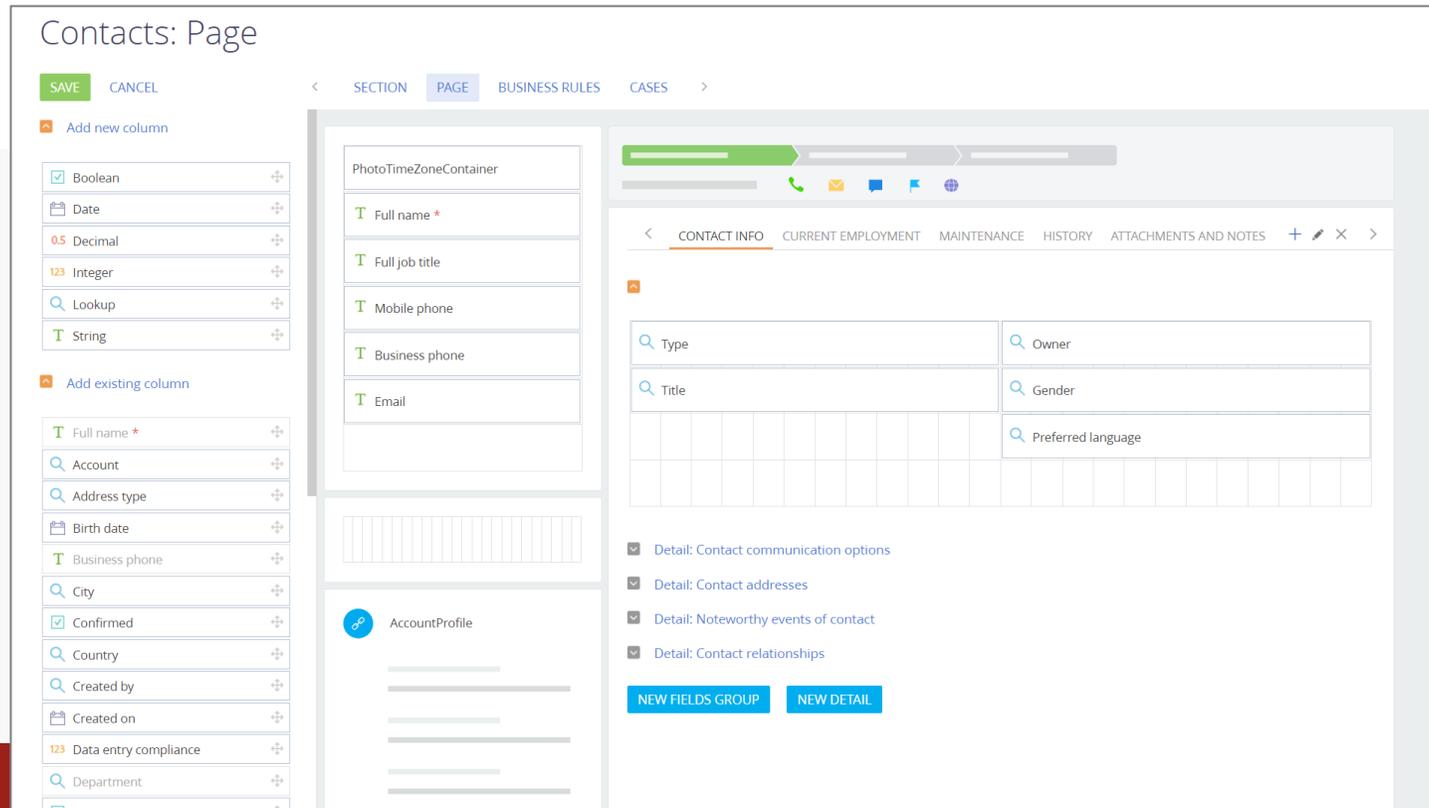
- Out-of-the-box metrics, reports, and dashboards
- Wizards for defining additional metrics and creating new reports and dashboards
- Interfaces for importing and/or exporting with external analytical systems

How are communications and messages handled?



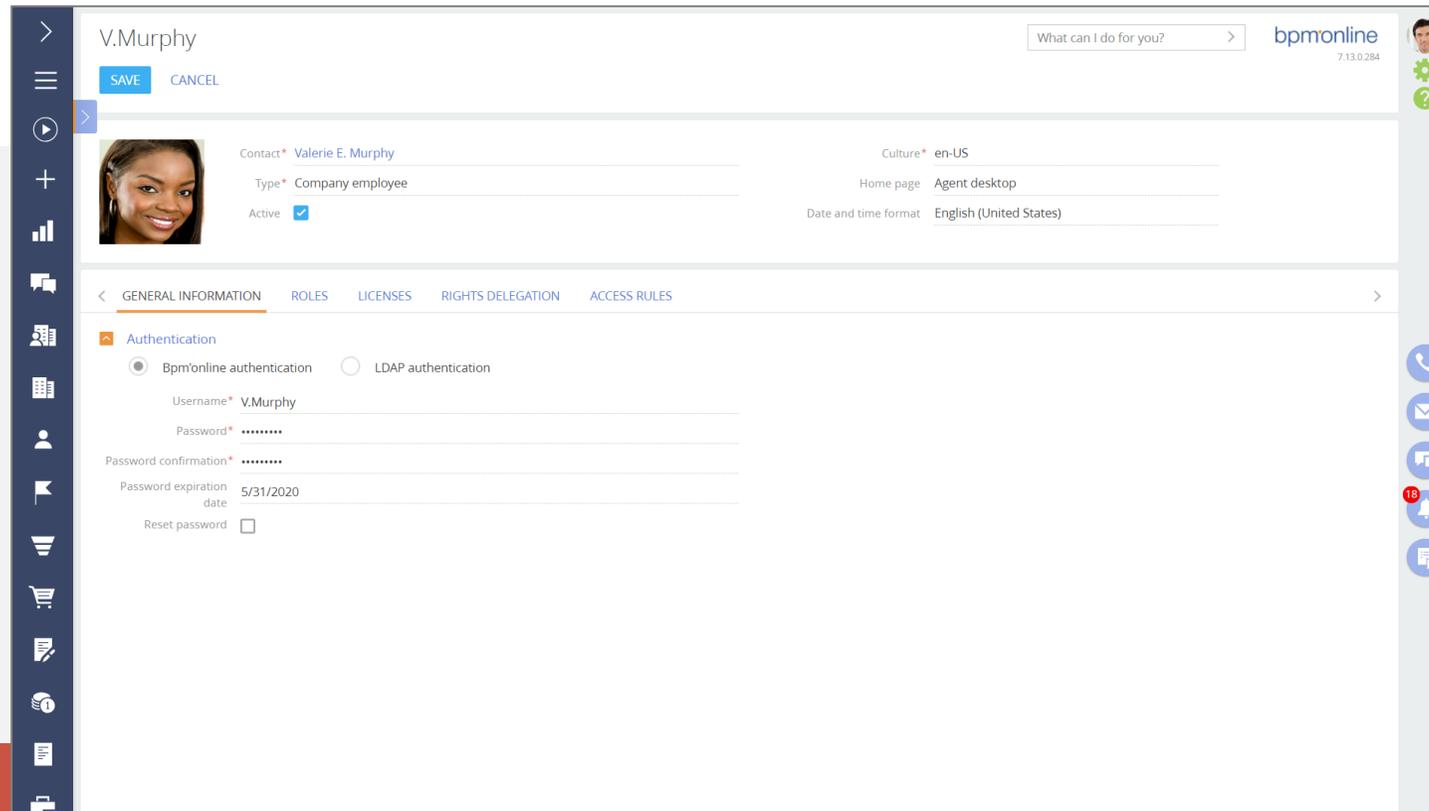
- Data import from / to Excel
- MS Exchange and Office365 integration
- PBX and cloud telephony integration
- Google integration
- Built-in integration with email and calendars
- Custom integration capabilities
- Mail integration via IMAP / SMTP
- Two-factor authentication

Wizards for no-code, real-time configuration and updates



- UI customization
- Agile system localization
- Visual content designer
- Business rules management
- Development configuration
- Mobile app customization
- Application personalization tools
- Dashboards and analytics

Industry-leading practices for authentication & permissions



- Data protection and multilevel security from unauthorized access
- Access rights management
- Web SSO support
- LDAP integration
- Activity log

Useful links re functionality, technology, and pricing



Sales:

<https://www.creatio.com/sales>

Service:

<https://www.creatio.com/service>

Marketing:

<https://www.creatio.com/marketing>

Studio:

<https://www.creatio.com/studio>

Technologies:

<https://www.creatio.com/our-technologies>

14-Day Trial:

<https://www.creatio.com/trial/creatio>

Pricing Calculator:

<https://www.creatio.com/crm-pricing>

Studio Pricing:

<https://www.creatio.com/studio/pricing>

Marketplace (add-ons):

<https://marketplace.creatio.com/>



Appendix: Information on Keen360



Who are our principals?



Zahid Khan

Partner

- **Background:** Advisor & leader for re-engineering workflow and delivering managed services for customer-facing operations & systems
- **Specialties:** Customer & commercial ops, CRM systems, data quality & analytics, business system design, managed services
- **At Keen360:** Leader for Service360 (BPO)



David Lashar

Partner

- **Background:** Advisor & executive leader for planning and delivering IT-enabled transformation in commercial industry & public health care
- **Specialties:** IT strategy, program & portfolio governance, solution architecture, CRM methods & systems, delivery excellence
- **At Keen360:** Leader for Engagement360 (CRM)

What is our mission and passion?

Client Success

We liberate executives and managers with customer-facing responsibilities to focus 1) on that which will enable them to seize their marketplace opportunities and realize their business strategies; 2) on that which will make their companies different and better than the competition.

Service Delivery

We enable company leaders to achieve consistency and excellence from their teams for commercial operations, customer care, and system support. We improve these teams via our professional services and solution suites. We complement these teams via our managed services.

Value Creation

We deliver alignment of teams and technologies with strategy. Insight on markets and customers. Availability and quality for data. Relevance and resonance with customers. Excellence in commercial operations and customer care. Compliance with standards and policies.

Passion & Commitment

We take pride in generating value for our clients and their customers; empowering our clients to achieve their objectives; fulfilling our commitments.

Experience & Performance

We believe in the power of visibility and transparency to bring about good decisions and high performance. Hence, our motto: See and serve your customers better.SM

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We make your commercial operations, customer care, and system support **better**.

With advisory, integration, and augmentation services, we do it **with you**.

With managed services and our near-shore support center, we do it **for you**.