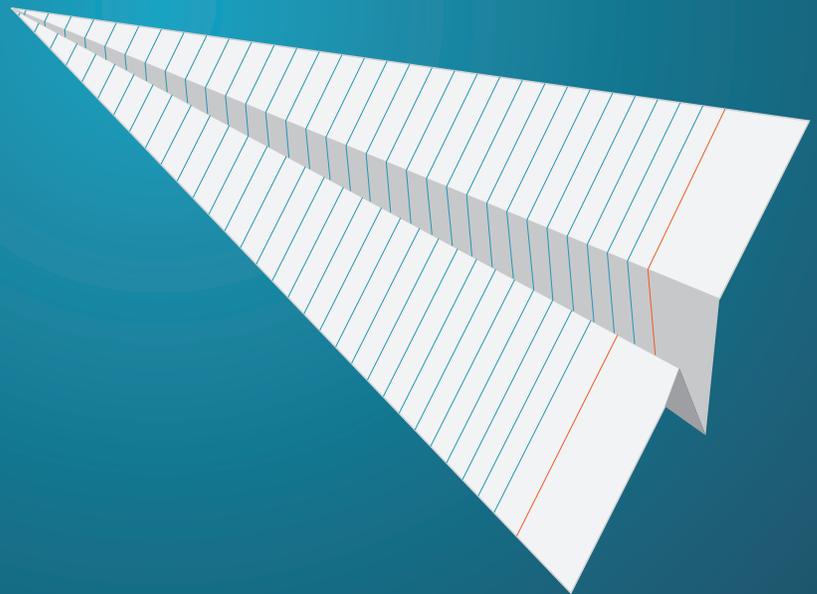




CASE STUDY

Chairman's View Success Story



ConcourseSuite from Concursive

Chairman's View creates valuable businesses with ConcourseSuite from Concursive and external collaboration



Company Profile

History

In 2003, a unique idea was hatched to help medium-sized business owners treat their companies like an asset—rather than a job—and maximize their return on investment. Chairman's View is the resulting process and set of tools that help owners focus on long-term value rather than short-term cash generation.

Today

Today, Chairman's View is a leading provider of education, tools and hands-on advice that help owners grow and maintain the value of their companies. They work directly with owners in the Northeastern United States

Challenge

Chairman's View desired a single scalable system to centralize their communications and management needs, that could also provide a platform for delivering a critical component of their offering—performance dashboards. ConcourseSuite 5.0 fills both needs admirably.

www.chairmansview.com

Chairman's View helps entrepreneurs to increase and demonstrate the value of their businesses. It provides an operational chairman, tasked with creating value by building a disciplined corporate structure, together with the communications and reporting infrastructure he or she needs to steer the business. Whenever Chairman's View takes on a new client, the first step is to install its customized version of ConcourseSuite for use as a communications and management platform.

"Anyone who runs a business, whatever size it is, cares about command and control of that business," says Chuck Richards, CEO of Chairman's View. "Our customized ConcourseSuite platform enables owners and CEOs to have that command and control. We have a clear and concise communications channel between the owner, CEO and management, which enables us to keep everyone on the same road. That channel includes the performance measures that show everyone how to be successful. For us to do our job, it is essential that we have a stable and efficient platform for

building a business. ConcourseSuite provides that."

Chairman's View has developed a dashboard application, which can be used to measure performance within the business and was built using ConcourseSuite's standards-based plug-in architecture. "The chairman can monitor business performance in real time," says Richards. "There are three aspects to that: revenue generation, which is forward looking; delivery, which tracks how well the company is meeting the sales promises it has already made and how much capacity is available;

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— Chuck Richards, CEO Chairman's View

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Customer Snapshot

In addition to utilizing ConcourseSuite to manage and deliver its own services, through the course of its engagements, Chairman's View uncovers client needs that can also be remedied by using ConcourseSuite.

One circumstance involves a mid-sized distribution firm in Connecticut. This company hired Chairman's View to assess its revenue pipeline, delivery system, management structure and financial organization; make recommendations based on those findings; and help with their execution.

The initial engagement uncovered several weaknesses within the company that ConcourseSuite could easily help solve. At the highest level, core activities relating to sales, customer service and delivery were mismanaged, not for a lack of talent, but because the company did not possess the tools and processes needed to properly operate and grow. ConcourseSuite provided key capabilities including:

- > Contact and Account management
- > Quote development and management
- > Activity and Task use for all Customer Service responsibilities
- > Portal access for clients and vendors
- > Pipeline generation
- > Various Reporting features



As the company faces new challenges and a possible change in ownership, they must bolster the efficiency of their operations, enhance customer satisfaction, increase staff accountability, and ensure that the tools and processes are in place to give the owners the time and energy to focus on growing the company. Embracing ConcourseSuite will achieve all of this, and then some.

and finance, which looks at the current financial position. This insight enables the chairman to have control of the business, so he or she can implement the vision that has been agreed to."

The dashboard has been developed using industry standard JSR-168 portlets. The latest release of ConcourseSuite includes a complete Portal/Portlet engine which allows any Java-savvy developer to develop custom applications that can be run and viewed natively from within ConcourseSuite. The interface is seamless for users. Portlets can combine data from within ConcourseSuite with data from legacy systems. "I don't know of anyone else who provides that level of flexibility at that price," says Richards.

ConcourseSuite is available under an open source license. "We knew at the outset that we needed an open source platform," says Richards.

"There are a number of advantages with open source. The software is more stable because there are more people working on it. It's not like dealing with a company where the code is theirs and theirs alone, which can make it difficult to make any changes. We can develop our custom pieces much more quickly using ConcourseSuite."

Richards was previously chairman of a software company for five years and conducted an extensive market evaluation before choosing ConcourseSuite as the platform to build upon. "Compared to other CRM vendors, we were impressed by the quality of the company, code and people at Concursive" he says. "The people at Concursive have been extremely flexible in their dealings with us. They understand our needs, and the team has been building world class software for seven years. ConcourseSuite has been highly ranked by inde-



CHAIRMAN'S VIEW

Building Valuable Businesses

pendent magazines, and our customers have the option to upgrade into all the additional functionality that ConcourseSuite provides."

Chairman's View builds business processes around ConcourseSuite which dramatically increase business value. "When you can lock down processes, companies become extraordinarily valuable," says Richards. "It proves they are well run and can be transferred. The value creation in using ConcourseSuite is tremendous."

Because ConcourseSuite provides an enterprise class security infrastructure, businesses are able to extend access to their trusted advisors. Chairman's View's clients can allow accountants and investors to access profit and loss totals, for example, while their attorneys can have access to everything. This transparency is also valuable for demonstrating the value of the business. Richards cites the example of one of his clients which approached its bank for a loan. "The bank wanted proof of the company's growth, so the chairman went into ConcourseSuite and provided the answers there and then," he says. "Within minutes, the bank had its own access to the dashboard through ConcourseSuite. It blew them away. They could get all the reports they needed automatically. Using ConcourseSuite, capital partners can see that it's a buttoned down company and can agree to a better deal more quickly."

As well as installing ConcourseSuite in client businesses, Chairman's View uses it to manage its own affairs. "Our regional chairs can see who's approached which customer, and can track our opportunities," says Richards. "ConcourseSuite is elegantly simple. Everyone is wowed by how we are able to run our business, and because we use the right tool in the right way, we're able to scale. If we didn't have ConcourseSuite, we'd need an extra three staff just to control the business and it would mushroom from there as we grew. Using ConcourseSuite, if we want to open a new office, we can do it tomorrow." 



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About Concursive Corporation

Concursive Corporation is the developer of ConcourseSuite, the first front office application suite to integrate CRM, content management and Enterprise 2.0 capabilities. A Java-based application with a standards-based plug-in architecture, ConcourseSuite 5.0 allows third-party developers to integrate applications and share data with key company applications including HR, financial, inventory/delivery, and logistics systems. It's used today by Fortune 500 companies in large configurations and by thousands of smaller enterprises. ConcourseSuite includes all common CRM modules and adds functionality such as collaborative Project Management, Website Authoring, Content & Document Management, Customer Surveys, and sophisticated Help Desk functions.