



The ACQUIREX™
Management Information Suite

MUNGO DUNNETT
ASSOCIATES

Our Specialism

ABOUT THE COMPANY

A lighthouse stands on a pier extending into the sea at sunset. The sky is a mix of orange, yellow, and dark blue. The lighthouse is white with a dark top section. The pier is made of stone or concrete blocks. The water is dark with some whitecaps. The overall mood is serene and professional.

Introducing MDA Systems

In recent years Mungo Dunnett Associates has established itself as a leading consultancy business in the Financial Services market. We have advised numerous organisations, in various countries, on the most effective use of management information, customer information and sales management systems.

Through our many discussions with clients, it became apparent that there was a lack of cost effective solutions in this area.

Hence the creation of MDA Systems, a company set up to offer a suite of products, addressing this issue.

Our practical approach builds on the success of Mungo Dunnett Associates, harnessing the knowledge and experience gained through working in this field. Because of this, the products we have developed are, we are told, outstanding in their field.

We are committed to delivering value to our clients and would be delighted to work with you in creating a solution tailored to your needs.

A tall, black and white striped lighthouse stands on a dark, silty hill at night. A bright beam of light emanates from the top of the lighthouse, illuminating the dark sky. The lighthouse has a white top section with a black band, and a black band below that. The hill it sits on is dark and appears to be made of sand or silt. The background is a dark, cloudy night sky.

Lighting the way

INTRODUCING ACQUIREX

Delivering commercially valuable Management Information

When choosing a new Management Information (MI) system, there are key aspects to be considered. A system should:

- Deliver useful MI to the appropriate staff – quickly and easily
- Involve minimal disruption to existing systems and processes
- Be intuitive and user friendly
- Ensure staff adoption
- Provide a cost effective solution

AcquireX – our solution

We have taken our expertise of the industry and developed AcquireX: a platform encompassing all of these key aspects.

AcquireX consists of three modules that can either work independently or interlock, forming a solution according to your needs. Each module is flexible and can be tailored to your precise requirements.



1

SALES MANAGEMENT

The purpose

The Sales Management module has three key functions:

- Captures key customer information, decisions and preferences
- Logs and tracks each stage of sales processes
- Tracks and analyses sales performance at all organisational levels, down to individual staff member

The full functionality

This module allows organisations to better manage their customers through the enquiry-application-sale process. It also provides a clear understanding of sales performance with interactive reports, enabling staff at all levels to obtain the information they need to make better informed business decisions.

The capture of key data linked to each stage of the sales process is intuitive and comprehensive. A follow-up process ensures that opportunities to contact

customers are not missed. Each member of staff has a personalised screen showing the follow-ups and interviews they have scheduled. Drill-down functionality then enables staff to access further details about enquiries and customers.

For instance, an interviewer can quickly access information about their next appointment, including all captured customer details, the enquiries they have made, when they were made and the stage each is at.

Summary

The Sales Management module:

- Captures customer contact
- Manages the follow-up process
- Shows scheduled interviews
- Provides key performance reporting
- Allows easy access to key data at point of sales

Installation usually entails minimal internal resource commitment and disruption.

2

LEAD GENERATION

The purpose

The Lead Generation module:

- Sends sales leads or recommended activities to front line staff in branches or call centres
- Allows tracking of these leads, so you can see which have been actioned
- Provides a contacts database that assists with contact strategies and post-campaign evaluation

The full functionality

This module is a conduit that allows sales or other customer contact leads to be distributed to the organisation's network. The system issues pre-prepared leads to the branches or call centre staff on the specified contact date.

Based on the data provided, staff will see which campaign the leads relate to

plus further key information, enabling them to carry out each contact effectively.

As part of the package we will advise on establishing an effective contact strategy, ensuring maximum benefit is gained from this module. This 'best practice usage' draws on our consulting experience in working with such systems.

Summary

The Lead Generation module:

- Sends leads from Head Office to the organisation's network
- Enables Head Office to ensure that customer-facing staff are focusing on the correct contacts at the right time and with the right information to hand
- Greatly facilitates the ability of staff to engage effectively with customers in sales or service situations
- Allows the tracking of campaign leads to facilitate campaign evaluation

3

CUSTOMER DATA CONSOLIDATION

The purpose

This is the link between your existing core systems and the AcquireX suite. In doing this, it:

- Incorporates data from your existing core systems
- Provides a complete overview of your customers' relationship with the organisation
- Provides this to customer-facing staff in branches and call centres

The full functionality

This module provides a complete overview of a customer's relationship with your organisation. By incorporating data from your existing customer and account systems, all information becomes available through one single portal. This provides a detailed view of how the customer is interacting with your business, from simple enquiries to actual products held.

Consolidation of data enhances existing technology investments, providing additional functionality and information where it matters.

The two main methods of achieving data integration are:

- System integration, enabling a real-time link between your core systems and AcquireX
- Data extracts, offering similar functionality with reduced complexity

We can work with you to determine the best solution for your needs.

Summary

The Customer Data Consolidation module:

- Provides a complete overview of customer relationships with your organisation
- Enables staff access to this information, so that they can view all relevant data concerning individual customers' existing product holdings, as well as enquiry behaviour

TECHNOLOGY THAT SUPPORTS YOUR NEEDS

AcquireX is a state-of-the-art solution using the latest technologies and industry standards. This provides the flexibility modern businesses demand whilst ensuring longevity, thereby maximising your return on investment.

An enterprise-grade web application

AcquireX is a web application based on enterprise-grade technologies with many benefits:

- It is designed for high availability and concurrent access
- It has security options and enforcement at all architectural levels
- Being a thin-client solution, deployment complexity is reduced
- A modular approach provides flexibility to modify the system for evolving needs over time
- Administrative facilities ensure high reliability and performance
- It serves as a platform for growth

Latest technologies and industry standards

AcquireX is based on the Java Enterprise Edition (Java EE) platform, a flexible architecture providing many benefits:

- Scalable and platform-independent architecture enables a range of deployment options
- Service Oriented Architecture (SOA) enables industry-standard integration with other systems
- Well-supported, open platform presents a sound investment for the future

Minimal disruption, maximum benefits

AcquireX is designed to complement your existing systems and infrastructure, with all popular operating systems and enterprise database platforms supported. Being a thin-client solution, AcquireX does not require a complex

distributed deployment, simplifying the implementation process and giving system administrators greater manageability. The minimal disruption also means that clients can begin using AcquireX and reaping the benefits quickly.

Working with us



Training

As part of our service, we will work with you to develop a training package to ensure that all relevant staff are trained in the use of AcquireX. Experience shows that it is the training and subsequent usage of systems that is the real determinant of their value.

We usually find that this is best done by a roll-out process, whereby a small number of key staff are trained who then roll this out across the organisation. Comprehensive user manuals are also provided.

Support

A specialist support team is available to advise you fully on user issues, to help with technical queries, and to rectify any issues that arise. A range of services are available to meet the level of support required, including telephone, e-mail and web-based.

Testimonial

It is vital to us that clients find us easy to work with, reliable and technically expert. This is reflected by our first client, the Cambridge Building Society:

'A key component of the Society's supplier selection strategy is based upon the organisational fit of both parties. In all of my dealings with Mungo Dunnett Associates and MDA Systems, I have been impressed with both their technical expertise and professional standards. It is not often that a company delivers both in terms of expectation and outcomes without disrupting the operations of the organisation. The friendly and flexible team at MDA are genuinely interested in going the extra mile and adding value to our service. This is a relationship that we will want to maintain.'

Roy Badcock, Head of Service and Operations

'The new Sales Management System (AcquireX) that MDA Systems have implemented at The Cambridge takes our performance management capabilities to

the next level. At the click of a button I can now review an up to date position of our lending performance and associated cross sales across a variety of measures and have a far greater understanding of our pipeline position. In challenging times it is particularly useful to keep a tight grip on what's going on, and that's just what the AcquireX system has allowed us to do.'

Andrew Ferguson, Head of Development

'It's easy to see the potential with our new AcquireX system. It has already allowed us greater control over what's going on and who's doing what, and has been built in such a way that its usage can grow as we get used to it. The key for front line staff is its ease of use and the functionality we now have at our fingertips.'

Laurie Harper, Area Manager



MDA Systems Limited & Mungo Dunnett Associates
11 Polstead Road Oxford OX2 6TW England

Tel (UK): 01865 311966

Tel (Overseas): +44 1865 311966

Web: www.mda-systems.com E-mail: info@mda-systems.com