

Opti-IT™

Unified Software for the IT Firm

OPTIMA
TECHNOLOGIES

MARKETING • SALES • SERVICE • PROJECTS • HR • MANAGEMENT



Opti-IT™ Features Drive Profitable Expansion of the IT Services Firm

- Manage Marketing campaigns to generate leads and increase prospects
- Provide reference and competitive information for use in the sales process
- Provide a 360 degree view of clients and prospects available to assist employees across the organization
- Manage opportunities to increase close rates and shorten sales cycles
- Provide flexibility to incorporate and enforce the firm's proven sales methodology
- Improve customer service and support, thereby increasing customer satisfaction
- Arm the support team with information to cross sell
- Empower employees to offer better service and to expand relationships with their clients
- Provide support contract tracking and administration
- Provide sales and service activity tracking
- Assist project managers in planning, estimating, and scheduling by providing an enterprise wide view of all projects
- Expedite project team assembly by providing a skills inventory for all current project assignments
- Facilitate cross-team communication
- Assist in identifying and recruiting skilled employees
- Provide valuable information for use in employee performance planning and evaluations
- Provide highly flexible project billing
- Reduce project risk, increase predictability, and improve cost control
- Give a complete view of all projects for better management of deliverables and resources
- Provide automated time reporting for both projects and service contracts
- Provide expense reporting integrated with sales, marketing, projects, and service contracts for improved control
- Promote a standard methodology within the organization
- Increase identification and use of best practices and metrics to climb the CMM and improve organization effectiveness
- Provide features facilitating rapid response to new system needs driven by process improvements
- Simplify regulatory compliance and reporting
- Simplify document handling and retention
- Improve recruiting effectiveness
- Manage and monitor improvement initiatives
- Enforce best practices
- Provide patented tools for simplifying the administration of system functions, data privileges, and security
- Provide options of either running on firm's own equipment or utilizing Optima's ASP
- Deliver a unified web-based solution providing sales, service, project professionals, and management 24/7 anywhere, anytime access to the system

MARKETING • SALES • SERVICE • PROJECTS • HR • MANAGEMENT

Profitable Expansion Fostered by Opti-IT

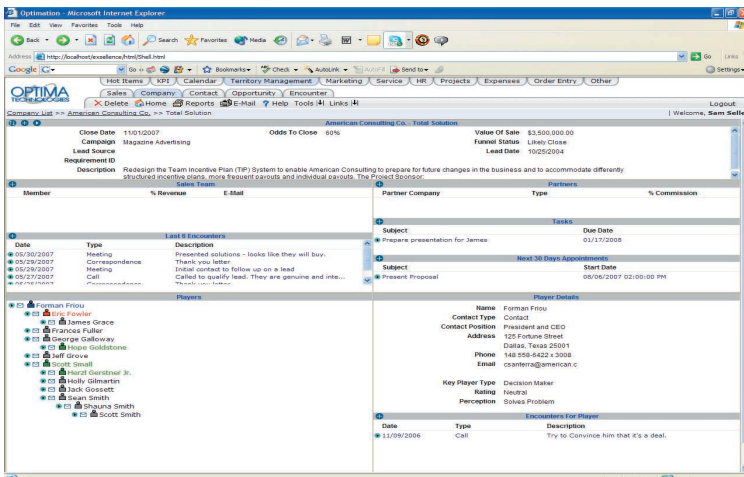
In the fast paced, highly competitive business environment facing an IT firm it is mandatory to excel in the execution of sales, service, operations and management. The IT services firm's staff is both its "life blood" and largest investment. They can make or break the company based on the way they perform. Optima's Opti-IT supports the company's marketing, sales, service, technical and management professionals in their daily activities. It provides the system tools needed to be both responsive and productive to clients and prospects. Opti-IT is a flexible, powerful system that automates all the major business processes. These include the process of selling, developing, delivering, supporting, billing and managing IT projects and software development. By aiding the team in execution of a diverse array of business activities, Opti-IT does not serve as a replacement for the professionalism of the team, but rather a significant multiplier of their talent, insuring the IT services firm's largest cost is also its greatest asset.

Opti-IT is a unified web-based solution constructed to fuel growth and profitability of the IT services firm. Its functions span contact management, marketing campaign management, sales opportunity management, help desk, issue tracking, support/service contract management, project time and billing, expense reporting, document management, improvement initiative management and business analytics. It leverages the company's employees, providing people with the system capabilities necessary to amplify their skills and effectiveness. Whether attracting new clients, retaining and expanding relationships with existing customers, or supporting and providing project services, a wide array of features and information is a "click" away. Data necessary to properly respond to issues, to measure progress on projects and to bill for services is always readily available. Opti-IT's value is further increased by its anywhere, anytime, availability resulting from its web based architecture and the proactive responsiveness possible because of its alerting capabilities. Optima's consistent track record of delivering systems on time and within budget adds a compelling reason for choosing Opti-IT over its competition. A staff armed with Opti-IT provides a solid foundation for an IT firm's profitable expansion.

Marketing and Sales Features Deliver More Prospects, Shorter Sales Cycles, Higher Close Rates and Revenue Growth

Opti-IT “Campaign Management” features increase productivity in the execution of marketing campaigns. Integration between the marketing and sales functions allow an organization to understand the results of campaigns and to adjust future strategies to capitalize on successful initiatives while discontinuing less effective activities. Other marketing functions assist, in the management of references, the collection and dissemination of competitive information, product information and the distribution of marketing materials to employees, prospects and clients. Database tools facilitate the targeting of prospects for new and add-on products or services. Mail merge and e-mail merge features raise marketers productivity. Workflow Agents and alerting combine to automate tasks and prompt necessary actions. When sales follow up is justified, all interaction and information gathered during the marketing process is automatically available to the sales team. The powerful combination of marketing functions helps insure a sufficient number of prospects are flowing into the sales funnel to meet an IT firm’s new client and revenue targets.

Opti-IT’s sales automation is predicated on the premise that for an IT Services Company to meet its sales objectives, its sales team must execute a disciplined sales process. Opti-IT provides a proven sales process framework which can be easily adapted to incorporate the requirements of different leading sales methodologies. The system includes a robust suite of contact management capabilities and a wide range of opportunity management features. They combine to keep the sales person focusing on the right prospects while communicating the benefits to all the “key players” necessary to close the business. Instead of being an administrative burden on reps and managers, forecasting and territory reporting becomes a simple to produce by-product of employing the system while executing the company’s proven sales process. The sales professional benefits from a 360 degree view of the client. All marketing, service and project history is always available to assist in closing new business. Even when the sales person does not have access to the web, he or she has up-to-date information available in their synchronized mirror edition of Opti-IT. Alerting features eliminate surprises and increase the representative’s ability to be proactive with the customer. The “bottom line” is Opti-IT delivers the functions necessary to shorten sales cycles, increase close rates, and grow revenues.



The Opti-IT Opportunity at a Glance capabilities presents a summary of pertinent information relating to an individual sales opportunity. It provides simple navigation to details pertaining to the customer or prospect and to the individuals involved in the decision making process.



The screenshot displays the Optima CRM interface for a client named American Consulting Co. The browser window title is "Optima - Microsoft Internet Explorer". The address bar shows "http://localhost/essence.htm#/id.html". The interface includes a navigation menu with options like Sales, Company, Contact, Opportunity, and Encounter. The main content area is divided into several sections:

- Company List:** American Consulting Co. with address: 125 Fortune Street, Dallas, Texas 25001. Business phone: 148.558.4422 x.3002. Website: www.americanconsulting.com.
- Next 30 Days Appointments:** A table with columns for Subject, Start Date, and End Date. One entry is "Present Proposal" starting on 08/06/2007 at 02:00:00 PM.
- Tasks:** A list of tasks with columns for Subject, Due Date, and Start Date. One task is "Prepare presentation for James" due on 01/17/2008.
- Opportunities:** A table with columns for Opportunity Type, Status, Value Of Sale, Close Date, Requirement ID, and Short Description. Two entries are shown: "Total Solution" (Likely Close, \$3,200,000.00, 11/01/2007) and "Professional Services" (Implementation, \$44,000.00, 09/30/2007).
- Last 3 Encounters:** A table with columns for Encounter Date, Encounter Type, and Description. Three encounters are listed: 05/30/2007 (Meeting), 05/28/2007 (Correspondence), and 05/29/2007 (Meeting).
- Contacts:** A list of contact names including Forman Prou, Eric Fowler, James Grace, Frances Fuller, George Galloway, Hope Goldstone, Jeff Grove, Scott Small, Herzi Gerstner Jr., Holly Gilmartin, Jack Gossett, Sean Smith, Shauna Smith, and Scott Smith.
- Contract Details:** A section for Forman Prou, Contact Type: Contact, Contact Position: President and CEO, Address: 125 Fortune Street, Dallas, Texas 25001, Phone: 148.558.4422 x.3008, Email: caarter@american.c.
- Encounters For Contact:** A table with columns for Encounter Date, Encounter Type, and Description. One entry is 11/09/2006 (Call) with description "Try to convince him that it's a deal."
- Future Appointments For Contact:** A section for future appointments.
- Uncompleted Tasks For Contact:** A section for uncompleted tasks.

All employees dealing with customers benefit from a 360 degree view provided by the Company at a Glance screen. It summarizes all pertinent information relating to an individual client. It provides simple navigation to additional details pertaining to the customer such as service contracts, projects or open issues.

Better Service, Higher Satisfaction, Growing Relationships

In an environment where success is dependent on significant continuing revenues from existing clients, support and customer service must excel. The customer service features of Opti-IT are specifically designed to facilitate responsive service. Whether problem tickets are submitted through a client self-service portal, through e-mail or over the telephone to a service representative, the information and priority are captured and available for either research or immediate resolution. Alerting and notification features insure the appropriate level of attention is given to each problem and the client is kept informed of progress. Each firm is able to establish its own thresholds for escalation and notification. If resolution is past due, escalation rules are followed and appropriate people are alerted so that resources are added where necessary and proactive customer follow up is provided. Service information is not only available to service personnel but selectively available to sales and management, eliminating costly surprises and providing an additional force for maintaining satisfaction.

When a help desk ticket requires the work of a developer or an engineer to address the problem, Opti-IT includes "Issue Tracking" functions to automatically track resolution through development, testing, and application of the fix. When complete or ready for validation by the customer, the issue is returned to the customer service rep for closure. Automatic notification and alerts are available to provide immediate visibility to the issue resolution process.

When support or maintenance is a fee service, Opti-IT's "Contracts" module simplifies administration. Business terms of the relationship are summarized and integration with the time reporting and billing functions keep track of spent and unused support hours. Support personnel have the information necessary to deal appropriately to meet contractual service levels or handle requests for service when an agreement is expired or not in place. When support renewals or the need for additional prepaid hours is coming due, appropriate personnel can be notified to insure this important source of revenue is realized.

Project Tracking, Time Reporting and Billing Functions Deliver Efficiency and Accuracy

Opti-IT's project tracking provides enterprise-wide, multi-project planning, scheduling and tracking. It is not designed to replace a firm's project management system but, instead, to compliment it. It is for organizations desiring visibility across all projects. Companies needing flexibility in billing for services in order to support diverse business terms and conditions gain these capabilities with Opti-IT. Opti-IT's project tracking time and billing provides functions which handle the imaginative terms the sales organization requires to meet clients' diverse demands. Opti-IT provides integration of sales, service, human resources, expenses, project tracking, time and billing data in order to simplify operational processes, better utilize staff and properly charge for its services. Project templates and Opti-IT's interface with MS Project provides these gains while mirroring your company's current work style. Opti-IT provides the flexible framework for defining tasks and sub tasks, prioritizing activities, allocating resources and tracking project progress. Resources can be dynamically allocated or specifically assigned to tasks and sub tasks of single or multiple projects. With a single database for all projects and resources, you can improve prioritization and better balance schedules and resources. This reduces the impact of constraints imposed by new project commitments, "scope creep" and the

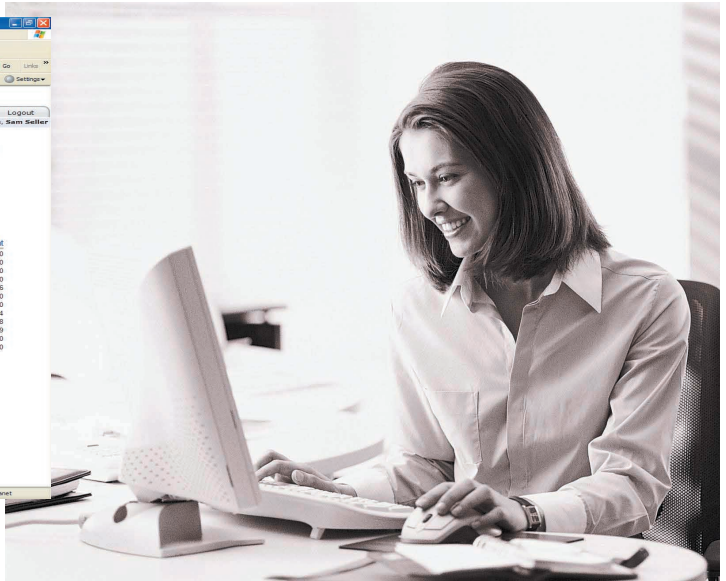
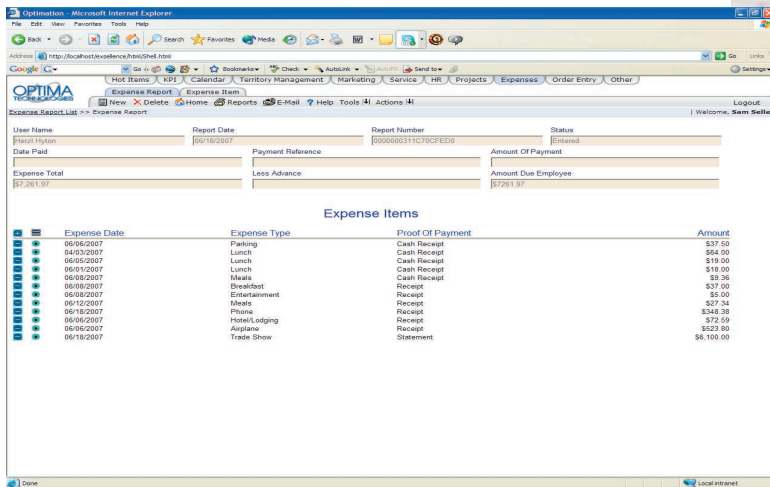
company's changing internal and customer needs.

Opti-IT provides anywhere, anytime time capture, access and reporting of project information. When field personnel need to report hours, project progress or client communications, Opti-IT's web architecture insures 24/7 information exchange whenever internet access is available. When geographic location or client security limits access, synchronization features provide access to all project information without connectivity requirements. Features, functions, user interface and all data security is identical in the local version of the system. When internet access becomes available it is a quick and simple process to send any information you have entered and receive any updates you are entitled to from the central host while your access was unavailable. The combination of web and offline access to Opti-IT improves timeliness and accuracy of time reporting and increases the firm's ability to respond with its services independent of the client's environment.

The Time and Billing component provides a comprehensive, flexible set of billing options. Parameters can be set in combination at the organization, project, task and resource levels. There are multiple options for time sheet entry and approval, including mark up/down. Using the time and billing functions together with the Expense and Issue Reporting business components, add the ability to generate time sheets when time support activities are logged and project related expenses are included on invoices. The system provides the ability to customize invoices by organization or by client and generate sales and/or payroll journals for posting to the company's back-end accounting system. Bills are produced accurately and on time. The risk of missed billings is diminished and the data to back up invoices is readily available. Client satisfaction improves along with the accuracy of billing. The efficiency in producing invoices increases and cash collections accelerate.



Expense Reporting, Document Management and HR Tools Boost Productivity



Expense reporting is one of the many functions that aid an IT professional effectively and efficiently complete their varied responsibilities.

Expense Reporting Controls Costs

Employee satisfaction is enhanced because a simple and secure process is available for capturing expenses. Users of the Expense Reporting component benefit from the anywhere, anytime capture and reporting features of Opti-IT. Like other functions throughout the system, capture of information on the employee's personal computer is available when internet access is not available. Accelerated payments to employees and billing to customers are both facilitated by Opti-IT. Expense data is easily associated with customers, vendors, projects or sales opportunities. Analytical functions assist the firm using Opti-IT to better control expenses and justify discounts from frequently used vendors.

Document Management Reduces Paper

Opti-IT document management features support a firm's efforts to reduce the costly flow and duplication of paper materials across the enterprise. Reports, forms, collateral, presentations, specifications, proposals, resumes and any other form of document can be stored, electronically reviewed and when necessary, printed. Retrieval of documents is typically a "click" away for the Opti-IT user. Document management features delivers efficiencies and economies in sales, service, production and administration.

HR's Skills Management and Recruiting Features Boost the Firm's Abilities to Attract, Retain and Properly Deploy Employees and Contractors

Opti-IT includes a human resources module which includes tools that assist the IT services firm in their employee utilization, retention and recruiting activities. This component provides a database to store information about potential, current and past employees. A skills inventory is easily assembled and a candidate profile is maintained. Documentation about personnel such as resumes, references and employee agreements are easily captured and retrieved. The security provisions insure personnel information is only accessible by those entitled and needing access. In the IT industry, where adding qualified employees or contractors is a constant priority, Opti-IT's human resources module saves time and money. It simplifies the processes and the persistent follow up that is mandatory to match client needs with the career objectives of prospective employees. Opti-IT's skills management and recruiting functions, combined with the visibility of future demands gained from the sales opportunity management, customer service and project management components, provides advantages when planning for, obtaining and utilizing personnel. The ability of an IT services firm to succeed is dependent on its ability to attract, retain and deploy employees and Opti-IT's HR features provide a significant competitive edge.

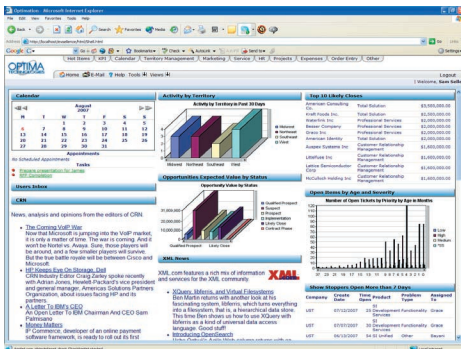
Business Analytics and Improvement Initiative Management Capabilities Drive Improved Results

Business Analytics Increase Understanding

The ability to analyze all sales, client and project information collectively facilitates management's understanding of the firm's operating performance, adherence to best practices, and compliance enforcement. Opti-IT's analytics, data monitoring and alerting, workflow agent, and improvement initiative management features work in conjunction with data from all Opti-IT components, as well as data from other disparate systems a firm utilizes. Unlike most systems, Opti-IT is not restricted to simply analyzing its own data, but rather expands the information boundaries to include all the data necessary for compliance and operations improvement. The enterprise view of a company and their clients' activities include detailed financial information, notes pertaining to client meetings and phone conversations, automatically captured inbound and outbound e-mail, traditional mail correspondence generated through mail merge functions and images of documents created as part of the client acquisition or management process. Activity levels can be monitored and alerts issued when deviations from standards occur or when people are under or over utilized. Key performance indicators are included for monitoring marketing, sales, service, project and financial results. Multiple graphs, lists, velocity dials, task lists and appointments, and other pertinent information available over the web is selectively included in personalizable portal pages and dashboards. Of course, data presented is always filtered based on the individual user's information rights and privileges.

The specific features of Opti-IT's business analytics include:

- Secure Information Distribution
- Personalized Dashboards/Portals
- Simple Lists Supported by Graphs
- Sorting, Finding, Filtering, Exporting and Printing of Data
- Personal and Institution Short Cuts



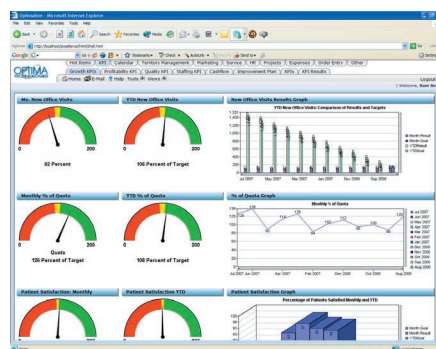
Portals are designed to include the different information required by varying functional departments of the IT firm. They can be easily personalized to specific individual or firm needs.

- Sharing of Data if Appropriate
- Sophisticated Information Presentation
 - Extended Views
 - Cross Tab Views
 - Union Queries
 - Chained Queries
- Flexible, Easily Configurable Drill Downs
- Web-based Distribution of Hard Copy Reports
- Alerts to Flag Issues

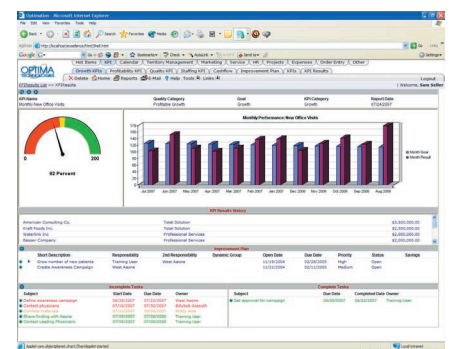
These business analytics capabilities can be applied by the customer to personalize their Opti-IT solution and increase its value to their firm.

Improvements Driven by Initiative Management Features

When opportunities for improvement arise, often initiatives are launched and people are assigned responsibilities in the quest of reaching goals and targets. Pressing day-to-day issues often cause employees to unknowingly defer tasks that make up key elements of such initiatives. Management follow up is difficult and frequently lacking, and planned results become left to chance. Opti-IT's Calendar, and Improvement Initiative modules combine to address these issues. Tasks associated with improvement initiatives are assigned and automatic notification can be included to either the individual or the manager when the tasks are past due and / or completed. The Improvement Initiative at a glance view gives team members a comprehensive view of the initiative. Tasks coming due and past due are highlighted for easy identification. Integration with the key performance data provides feedback on the success of the related initiative. Actions can be adjusted, reinforced, or intensified when appropriate. Opti-IT provides an added degree of control over the business and a key contributing factor to its continuing improvement.



Multiple dashboards are included showing performance on key measures for sales, service, projects and finance.



The Improvement Initiative at a Glance dashboard provides management feedback on the status of tasks and the results being achieved for each initiative.

- **Security and Workflow Agents Simplify Adoption of Opti-IT to a Firm's Changing Processes**
 - **Runs on Choice of Servers, the Firms or Optima's**
 - **Optima is Committed to Client Satisfaction**

Security and Workflow Agents

The IT firm can utilize Opti-IT's Security and Workflow Agents to adapt "out of the box" capabilities to the specific demands of an individual firm's current or evolving business processes. Opti-IT's underlying technology framework includes security, information flow, workflow, and business process agents. It includes administrative tools which, with training, can be applied by a firm to modify security, create custom workflow to support improvements in the firm's business processes, reduce administrative burden, improve efficiencies, and both extend longevity and benefits of the system. It allows a firm to apply best practices across the organization, thereby increasing the company's benefit to its clients without increasing its systems investment. The result is a web based unified system that is both easily and economically adaptable, as well as scalable, to meet the needs of a large rapidly growing IT company.

Web Application Hosted by Client or Optima

Whether a business elects to utilize Optima's ASP service to outsource the running of Opti-IT or elects to acquire a license to the software and provide such services directly to its personnel, Optima supports the firm each step of the way. The implementation is based on Optima's proven READI methodology. The client and Optima work from a single project plan which contains pre-agreed responsibilities of

each party. The firm can elect to deploy the industry specific functions "out of the box" with limited or no configuration or may choose to more extensively tailor or customize the system to meet firm specific unique requirements. The time and cost of the implementation is dictated by the amount of personalization of the sales, service, and operations functions. The benefits of the base system are tremendous; an estimate of incremental benefits and costs which are derived by the creation of unique modifications are typically easily justified. The configuration and any custom features are added during the implementation. Data integration tasks are performed and information in legacy systems is captured and cleansed. Organization and user information, including their initial rights and privileges, are set up. The system deployment takes place in a timely fashion on a predetermined and agreed to fixed price and schedule.

Committed to Your Satisfaction

Optima's award-winning team of professionals is dedicated to providing you the highest level of service and committed to satisfying your every need. From sales to support, the Optima team is focused on increasing your satisfaction and providing software solutions that help you achieve your firm's goals.

Opti-IT Results: The IT firm is significantly benefited in their ongoing drive to grow and improve their business. Work processes to obtain new clients and expand existing relationships, to service clients and enhance customer satisfaction, to attract and retain top talent, to effectively deploy personnel to internal and client projects, to be able to offer and bill for services on a flexible market driven basis, and to provide the information needed by employees to accomplish both their tactical and strategic responsibilities are each enhanced when Opti-IT is used. Optima's approach of working hand in hand with its clients on the implementation and use of its software has achieved unprecedented levels of success. If you are interested in investigating your firm becoming one of Optima's next satisfied customers, call 1-800 821-7355 or visit Optima-tech.com.



1-800-821-7355

www.optima-tech.com

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